

Digital technologies and the future of the Australian fashion industry



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Overseas Fellowship

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i. Executive Summary

The changes currently taking place in fashion retail are unparalleled – digital technologies represent both the single biggest threat and opportunity that the industry has faced in a generation. Rather than sheltering behind our geographic isolation as has been a common practice to date, Australian companies have the opportunity to be placed at the forefront of innovation in relation to adaptive business models and the development of effective online strategies to retain existing customers and attract new ones courtesy of the borderless new world of “e-tail”. These opportunities for savvy entrepreneurs are being enhanced by the roll out of high speed broadband via the National Broadband Network (NBN), described by the Innovation and Business Skills Association (IBSA) as the most significant piece of cultural infrastructure ever built in this country (IBSA, 2013).

The globalisation of retail through the rapid development of internet technologies has, however, left many Australian fashion retail brands floundering. The retail and fashion industries have been slow to react; even slower have been the educators that service these sectors. The net result is a skills gap with organisations being forced to fill positions from overseas candidates due to insufficient depth of talent in Australia. Adjustment for many firms has been hampered by low agility and opportunities have been lost through poor “e-skills” and a lack of “e-readiness”. The situation, while highly fluid and impacted by a diverse range of internal and external variables, is now starting to change.

eFashion is defined as the process of buying and selling fashion via the internet and may include functions such as online marketing, content management, payment gateways, inventory management systems, social media management and data collection methods.

This Fellowship sought to identify the world’s best practice in relation to eFashion education by examining programs currently offered by institutions in the UK and in Italy in order to understand their format, content and key areas of focus. The intention is to use these insights as the basis for educational programs to be delivered in Australia and contextualised for the Australian landscape in order to address specific skills deficiencies. The research was conducted primarily through one-on-one interviews with specialist educators involved in the design and delivery of such programs. This data was triangulated with the views of current industry operators in order to determine key directions for future application.

The key findings are summarised below.

The fundamental orientation of fashion programs is heavily influenced by the culture of the country in which the program is delivered.

In the UK, with a population three times that of Australia, scale allows educators in this sector to offer specialisation as a competitive point of difference, resulting in a broad array of courses often aimed at narrowly defined niches. Being largely a service economy, however, and with an abundance of high profile brands headquartered within close proximity, the eFashion programs offered in the UK are designed for use in the retail application of digital technology.

In contrast, Italy’s retail sector is less commercially developed and its fashion industry is design driven, guided by the artisan heritage from which it originated. The industry ethos is culturally entrenched and at odds with the concept of fast fashion. The high end luxury focus places greater emphasis on product (quality, design, branding) and one-to-one customer service. Hence, ecommerce as an emerging construct is downplayed in both a business and educational sense.

The focus of content in educational programs needs to be heavily strategic in emphasis - rather than information technology (IT) based. This assumption is predicated on the inherent base level of knowledge that graduates possess in relation to technical aptitude and that other operational skills can be learned on the job. In addition, the highly dynamic nature of the technology and its application means that graduates must be adaptable. A strong strategic base and knowing how to apply these skills in rapidly changing contexts will ensure that the industry remains globally competitive.

i. Executive Summary

Finally, with the occupations in demand in the creative and cultural industries overwhelmingly in the digital areas and emerging opportunities in retail fashion permitting global entry for regional players, coordination of industry resources is paramount.

The Fellow's basic recommendations, therefore, rely on key fashion stakeholders recognising the potential in the opportunities being presented and working in a united and cohesive manner to provide the best outcomes for the future of the industry.

Table of Contents

i	ii. Abbreviations/Acronyms
ii	iii. Definitions
1	1. Acknowledgements
1	Awarding Body – International Specialised Skills Institute (ISS Institute)
2	Supporters:
5	2. About the Fellow
7	3. Aims of the Fellowship Program
8	4. The Australian Context
10	SWOT Analysis
11	5. Identifying the Skills and Knowledge Enhancements Required
13	6. The International Experience
13	Destination: London College of Fashion (UAL) - interviews and research hub
16	Destination: Instituto Marangoni (London) - interviews and observation
18	Destination: University of Winchester - interview
20	Destination: University of South Wales - interviews and observation
23	Destination: The University of Manchester - interview
25	Destination: Instituto Marangoni (Milan) - interview (course specific)
26	Destination: SDA Bocconi – Milan
28	Concluding remarks:
29	7. Knowledge Transfer: Applying the Outcomes
30	8. Recommendations
32	9. References

ii. Abbreviations/Acronyms

AIMIA	Digital Industry Association for Australia	R&D	Research and Development
AQF	Australian Qualifications Framework	RMIT	Royal Melbourne Institute of Technology
BA	Bachelor of Arts	RTO	Registered Training Organization
BSc	Bachelor of Science	SDA	Scuola di Direzione Aziendale (School of Management)
CAE	Council of Adult Education	SEM	Search engine marketing
CME	Computer Mediated Environment	SEO	Search engine optimisation
COSBOA	Council of Small Business of Australia	SMEs	Small to medium sized companies
DEEWR	Department of Employment, Education and Workplace Relations	SWOT	Strengths, Weaknesses, Opportunities and Threats
EDM	Electronic Direct Marketing or eMail Direct Marketing	TAFE	Technical and Further Education
EU	European Union	TCF	Textiles clothing and footwear industry
FDA	Foundation Degree	TDC	TAFE Development Centre
HTML	Hypertext mark-up language	TFIA	Council of Textiles and Fashion Industries of Australia
IT	Information Technology	UAL	University of the Arts London
IBSA	Innovation and Business Skills Association	UCAS	Universities and Colleges Admissions Service
LCF	London College of Fashion	USW	University of South Wales
MA	Master of Arts	VECCI	Victorian Employers Chamber of Commerce and Industry
NBN	National Broadband Network	VET	Vocational Education and Training
PR	Public Relations		
QAA	Quality Assurance Agency for Higher Education		

iii. Definitions

Adobe Creative Suite (CS)

A suite of software packages developed by Adobe Systems that includes Photoshop (a graphics editing program) and Illustrator (a vector graphics editor) - two of the most commonly used programs in fashion.

A Levels (more formally known as the General Certificate of Education)

Advanced Level, is the academic qualification awarded at the completion of secondary education in the UK (Australian equivalent to VCE or HSC).

Associate Degree

Entry level vocationally based post-secondary academic qualifications. Typically two years in duration and usually articulating to a bachelor degree after completion of a third year; known in the UK as a Foundation Degree.

Blog(Weblog)

An interactive website (often of a collaborative nature) listing entries in reverse chronological order posted by individuals or firms.

Bricks and Mortar

Physical stores that provide commercial opportunities in a traditional retail environment with face-to-face interaction between buyers and sellers.

Creative Industries

A diversity of economic activities that relate to the generation of information and knowledge. Typically these include fields such as art and design, film and television, performing arts, architecture, music and fashion amongst others.

Digital Native

One who has grown up with digital technology and has become proficient with its use through frequent interaction.

eCommerce

Electronic commerce typified by the buying and selling of goods and services in a computer mediated environment using the internet.

eFashion

The process of buying and selling clothing, footwear and accessories via the internet Including online marketing, content management, payment gateways, buying and inventory management systems, social media management and data collection methods.

Foundation Degree

A para-professional post-secondary educational qualification, the UK equivalent of the Australian Associate Degree.

iii. Definitions

Gamers

One who plays video games or is involved in the development of video game technology (software or hardware).

Graduate

A student who has completed and received a bachelors or similar degree.

High Street (brands)

Also known as chain stores. Mid-tier fashion brands with multiple retail outlets selling frequently purchased 'shopping' goods.

Hypertext Mark-up Language (HTML)

Basic coding that is the foundation of many websites though increasingly superseded by proprietary software packages

mCommerce

Mobile commerce whereby electronic commerce is facilitated by mobile devices Including smart phones and tablets, allowing transactions to be completed in the consumers' hand.

MS Excel

A spreadsheet application developed by Microsoft (MS) for complex calculations and data manipulation.

MS Office

A Microsoft software suite that includes MS Excel, MS Word and MS PowerPoint in addition to several other programs.

Offline (retailers)

Retailers conducting operations via physical stores.

Online (retailers)

Retailers conducting operations via the internet for either desktop or mobile devices or both.

Open-to-buy

The budget available to spend on additional inventory.

Pure Play

In eCommerce, a term that is used to describe retailers whose sole channel of distribution is via the internet and whose business model excludes a physical store environment.

(The) Quality Assurance Agency for Higher Education

An independent body responsible for conducting auditing, benchmarking and performance reviews of universities and colleges in the UK.

Search Engine Optimisation

The active management of web site visibility in search engines through the manipulation of metatags and key word searches.

Search Engine Marketing

Improving website visibility (frequently through the use of SEO).

Semiology

A philosophical theory of the functions of signs and symbols, now applied to other areas (e.g. Fashion Technology).

TAFE

Technical and Further Education. Colleges and registered training organisations (RTOs) that provide a broad range of vocationally based education programs governed by the Australian Qualifications Framework (AQF) through to Advanced Diploma level. Programs often articulate to bachelor's degrees.

Team Teaching

A group of teachers working together to plan, conduct and assess the learning activities of the same group of students.

UCAS

University and Colleges Admissions Service. Equivalent to Victoria's VTAC (Victorian University Admissions Centre) - it is the British admissions service for students applying for university programs.

Undergraduate

A student who has yet to complete a bachelors or similar degree.

Vocational Education and Training

Nationally based training partnerships between governments and industry which typically emphasise practical skill acquisition as distinct from scientifically based courses of tertiary study.

1. Acknowledgements

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Awarding Body – International Specialised Skills Institute (ISS Institute)

The International Specialised Skills Institute Inc is an independent, national organisation that for over two decades has worked with Australian governments, industry and education institutions to enable individuals to gain enhanced skills and experience in traditional trades, professions and leading-edge technologies.

At the heart of the ISS Institute are our Fellows. Under the **Overseas Applied Research Fellowship Program** the Fellows travel overseas. Upon their return, they are required to pass on what they have learnt by:

1. Preparing a detailed report for distribution to government departments, industry and educational institutions.
2. Recommending improvements to accredited educational courses.
3. Delivering training activities including workshops, conferences and forums.

Over 200 Australians have received Fellowships, across many industry sectors. In addition, recognised experts from overseas conduct training activities and events. To date, 22 leaders in their field have shared their expertise in Australia.

According to Skills Australia's 'Australian Workforce Futures: A National Workforce Development Strategy 2010':

Australia requires a highly skilled population to maintain and improve our economic position in the face of increasing global competition, and to have the skills to adapt to the introduction of new technology and rapid change.

International and Australian research indicates we need a deeper level of skills than currently exists in the Australian labour market to lift productivity. We need a workforce in which more people have skills, but also multiple and higher level skills and qualifications. Deepening skills across all occupations is crucial to achieving long-term productivity growth. It also reflects the recent trend for jobs to become more complex and the consequent increased demand for higher level skills. This trend is projected to continue regardless of whether we experience strong or weak economic growth in the future. Future environmental challenges will also create demand for more sustainability related skills across a range of industries and occupations.

In this context, the ISS Institute works with Fellows, industry and government to identify specific skills in Australia that require enhancing, where accredited courses are not available through Australian higher education institutions or other Registered Training Organisations. The Fellows' overseas experience sees them broadening and deepening their own professional practice, which they then share with their peers, industry and government upon their return. This is the focus of the ISS Institute's work.

For further information on our Fellows and our work see <http://www.issinstitute.org.au>.

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1. Acknowledgements

Fellowship Sponsor

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Supporters:

In Australia:

- Mr Michel Abysekera, Director, Council of Textiles and Fashion Industries of Australia
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- Mr Keith Cowlshaw, Executive Director Vocational Education, RMIT University
- Mr Shaf Dewani, Managing Director, Aesthetics Group
- Mr Ken Greenhill, Fellowship Advisor, ISS Institute
- Dr Robyn Healy, Associate Professor and Head of School Fashion & Textiles, RMIT University
- Ms Jo Ann Hicks, Head of Strategy, Mobile and Customer Programs, eBay Australia and New Zealand
- Ms Jo Kellock, former Chief Executive Officer, Council of Textiles and Fashion Industries of Australia
- Ms Bianca O'Neill, Director, Dizzy Digital Media Consulting
- Mr Bob Paton, Chief Executive Officer, Manufacturing Skills Australia
- Mr Steven Smith, Director, Digital Consulting, Deloitte Digital
- Ms Ashli Templar, Communications Co-ordinator, Bardot.

In the UK:

- Dr Savithri Bartlett, Programme Director, Fashion & Media Marketing, University of Winchester
- Ms Sedge Beswick, Global Social Media Manager - ASOS
- Ms Patricia Brien, Course Leader BA (Hons) Fashion Promotion, University of South Wales
- Mr Fabio Ciquera, Programme Leader, Fashion & Business, InstitutoMarangoni (London)
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- Mr Jemma Oepfen, Faculty of Business & Society, University of South Wales
- Mr Gemma Peterson, Faculty of Creative Industries University of South Wales
- Mr Edwin Phiri, Course Leader, Foundation Degree, Fashion Marketing & Promotion, London College of Fashion.

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- Mr Keith Cowlishaw, Executive Director Vocational Education, RMIT University
- Ms Tina Guglielmino, Deputy Head VET, RMIT University
- Dr Robyn Healy, Associate Professor and Head of School, Fashion and Textiles, RMIT University.

Organisations Impacted by the Fellowship

Government:

- Australian Trade Commission (Austrade)
- Business Council of Australia
- City of Melbourne (Knowledge Melbourne)
- Department of Education and Early Childhood Development (Victoria)
- Department of Employment, Education and Workplace Relations (DEEWR, now known as Department of Education and Department of Employment) (Australia)
- Department of Foreign Affairs and Trade (Australia)
- Department of Industry, Innovation, Climate Change, Science, Research and Tertiary Education (Australia)
- Department of State Development, Business and Innovation (Victoria)
- Education Services Australia Limited
- Higher Education and Skills Group (previously Skills Victoria)
- Tourism Victoria Industry

Professional Associations:

- Australian Fashion Council
- Australian Retailers Association
- Australian Retail Institute
- Australian Marketing Institute
- Australian National Retailers Association
- Council of Small Business of Australia (COSBOA)
- Council of Textiles and Fashion Industries of Australia (TFIA)
- Digital Industry Association for Australia (AIMIA)
- Victorian Employers Chamber of Commerce and Industry (VECCI)

1. Acknowledgements

Education and Training:

- Australian Centre for Retail Studies (ACRS)
- Council of Adult Education
- Private RTOs offering fashion, business or retail training programs
- RMIT University School of Fashion and Textiles
- TAFE Development Centre (TDC)
- Victorian and Australian TAFE Institutes

2. About the Fellow

Name: Anthony John (Tony) Cooper

Employment: Lecturer, Fashion and Textiles Merchandising,
Royal Melbourne Institute of Technology (RMIT)

Qualifications:

Bachelor of Arts (Sociology), Monash University, 1987

Bachelor of Business (Marketing), Monash University, 1987

Certificate IV in Vocational Education and Training, RMIT, 2010

Masters of Marketing, RMIT

Professional Memberships:

Member - Australian Marketing Institute

Member - TAFE Development Council – Digital Educators Network

Member – Australia and New Zealand Marketing Academy (ANZMAC)

Member – Australian Institute of Management

Biography:

Cooper has worked for more than 20 years as a senior executive in a variety of roles in consumer goods and fashion marketing.

Cooper's professional marketing career began in the late 1980s at The Uncle Toby's Company during which time he was involved in some of the most innovative new product launches ever seen in the Australian grocery industry.

Joining Pacific Brands in 1991, Cooper gained a strong grounding in the fundamentals of fashion and textiles merchandise and marketing with Australia's largest importer and manufacturer of clothing and owner of some of Australia's most iconic brands including Bonds, Holeproof and Jockey.

Seconded in 1995 to work with Kmart Australia, the Fellow gained exposure to the retail side of the clothing industry in a senior marketing position providing valuable insights into the dynamic world of retail.

Cooper was then offered the opportunity to join a consortium of off shore investors in the late 1990s to launch Australia's first interactive online auction during the 'dot-com' era. It was this experience that led the Fellow to develop a keen interest in the structural change taking place in Australian retail, and in particular, the emerging impact of ecommerce in the retail fashion segment.

Seven years working as product director with the Italian sportswear label Fila in their Australian subsidiary saw the Fellow lead the areas of product design, development and sourcing. Cooper then leveraged this experience to operate his own clothing importing operation for a further three years.

2. About the Fellow

The Fellow's career turned to academia in 2009 when he joined RMIT University in the College of Design and Social Context as an adjunct in the School of Fashion. Now, a full time member of the Fashion and Textiles Merchandising program at RMIT, Cooper delivers courses in Fashion Marketing and Global Marketing and is a mentor in the highly regarded Young Essentials Project (YEP) – a leading industry based project that sees students working with fashion retail industry partners including Myer, Country Road, Sportsgirl and Target. The Fellow will shortly commence his doctoral thesis in marketing and is conducting early stage research into key areas of fashion retailing.

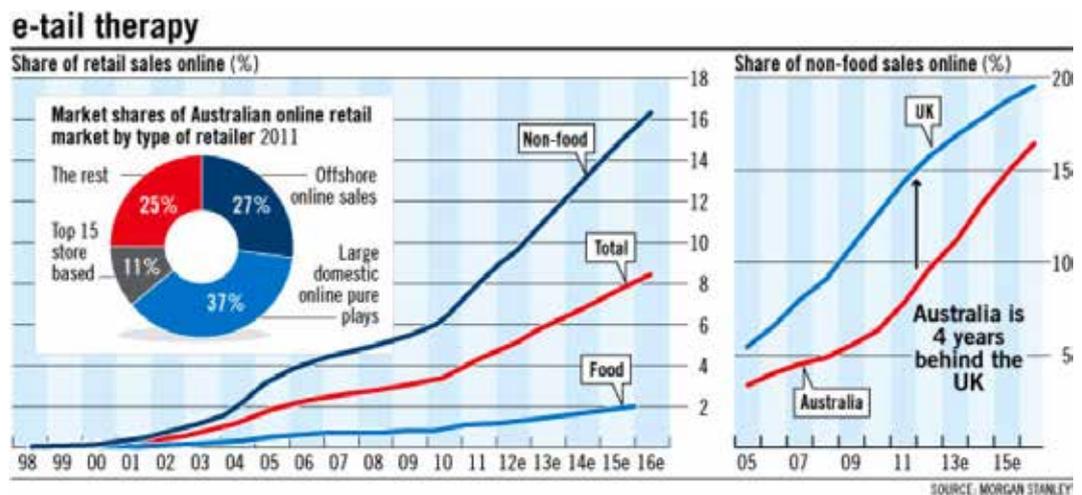
3. Aims of the Fellowship Program

The Fellowship provided the opportunity to examine academic programs currently in operation overseas that prepare fashion students for working in a computer mediated environment, in particular:

- To identify eFashion education world's best practice programs and use these as a benchmark in the development of a model appropriate for the Australian fashion education context
- To understand the essential elements required in an effective eFashion education program
- To identify teaching resources, methodologies and assessment tools currently in use by overseas eFashion educators and to assess their appropriateness for the Australian fashion context
- To identify the types of technology including software programs, hardware devices and internet interfaces that Australian eFashion operators will need to master and to determine the skill levels necessary to be competitive on the international eFashion stage
- To provide learners with a basic understanding of the strategic and operational imperatives of eFashion.
- To support the needs of the fashion retail industry caused by rapid change in the retail landscape.

4. The Australian Context

The changes currently taking place in fashion retail are unparalleled – digital technologies represent both the single biggest threat and opportunity that the industry has faced in a generation. Indeed, according to Retailbiz.com.au we have now reached a ‘tipping point’ beyond which things will never be the same again (Retailbiz, March, 2012). Current operators in the Australian fashion industry are poorly equipped to cope with the revolutionary shift in work practices as training in the retail application of digital technologies has never been available. Global competitors, however, are already addressing these shortcomings with access to extensive training programs aimed specifically at fashion. The results are reflected in their dominance of e-tailing within the fashion retail sector. Australian operators are already behind their US and UK counterparts.



Significant numbers of young recruits in the fashion industries enter directly from the fashion programs at TAFE and higher education level and through private fashion colleges. At present, graduates are exiting these institutions under-equipped for the commercial realities of fashion in the digital age. The post-secondary education sector needs to manage the capability gap and address the skills and knowledge deficiencies by providing learners with a level of understanding that will facilitate communication with professionals in the IT and related industries to develop products suitable for fashion branding and retailing.

The opinions of some key current operators in the Australian business environment offer the following insights into the directions of digital fashion and the skills sets required for success:

Ashli Templar, Communications Coordinator, Bardot (women’s fashion retailer):

- » Writing skills need to be honed during tertiary studies – those operators from journalism backgrounds have a competitive advantage over others
- » Templar is a strong believer in understanding the strategic applications of social media platforms and the need for basic technical skills (including HTML).

4. The Australian Context

Steven Smith, Director, Digital Consulting, Deloitte Digital:

Smith also emphasises proficiency in the strategic use of social media tools – taking ‘digital natives’ beyond the day to day operational side of social media

- » A good eye from the cloth perspective doesn’t necessarily translate into digital two dimensional applications
- » A one size fits all approach to fashion business education is becoming less appropriate with fragmentation of markets and communication channels.

Bianco O’Neill – Director, Dizzy Digital:

- » Fashion companies no longer have a ‘digital’ department – they now have a digital specialist in every department. Specialisation is where the digital industry is heading. Educational courses need to acknowledge this
- » An overarching requirement when hiring people to manage the digital requirements of a fashion company – is still that ‘passion for fashion’ – rather than a passion for digital ... Which means that fashion grads with a good digital grounding will be favourably regarded when applying for positions up against marketing and/or media and communications graduates, though at present the latter are winning the jobs largely because these programs entered the digital space first
- » O’Neill is a strong advocate for pushing the entrepreneurial opportunities that eFashion brings, particularly in Melbourne where small business applications abound.

Jo Ann Hicks, Head of Strategy, Mobile and Customer Programs, eBay Australia and New Zealand:

- » Australia has a shortage of good talented people in the (fashion) retail digital area. In terms of personnel, a significant gap exists between what’s available and what’s required with many companies bringing in expertise from overseas (Hicks documents several examples)
- » Broad divergence of expectations from employers when recruiting for ecommerce roles – with many failing to understand the dearth of talent and therefore the cost of hiring proficient operators (supply and demand)
- » Due to the dynamic nature of the industry, the pace of change and the broad scope of change – many skills can only be learned on the job through experience. Hicks suggests secondments and internships are the best (win / win) solution
- » Every company needs an ecommerce team now and merchandisers will always be an element of ecommerce.

A broad analysis of the current state of efashion education in Australia follows;

SWOT Analysis

Strengths:

- Opens new global markets for Australian brands to compete worldwide unfettered by size or distance
- A highly skilled pool of talent already exists in Australia with fashion graduates at world standard in skills and knowledge
- Academic institutions in Australia show a desire to evolve to attain best practice
- Convergence of economic and social circumstance have brought the issue to prominence in the Australian retail fashion industry
- Continued growth in commercial rents forcing a challenge to traditional paradigms plays to the digital sector
- Fashion retailers reappraising their business models
- Roll out of the NBN providing a world competitive infrastructure for ecommerce platforms.

Weaknesses:

- Lack of government support with reduced TAFE and higher education funding
- Fragmented approach from fashion and retail industry peak bodies
- Opportunities for on the job experience are limited by geography, increased off-shore ownership of fashion retail operations, as well as number and size of local enterprises
- Inertia from Australian based fashion retailers
- Aggressive market entry strategies employed by offshore pure plays
- Overlap between business, IT, media and creative arts faculties leading to 'jurisdictional' conflicts.

Opportunities:

- Greater collaboration with industry partners in relation to funding and experience opportunities
- Cooperation between Australian colleges and their offshore counterparts both at the educator and institution level in relation to content and delivery
- Ongoing exploration and development via academic research
- Evolve existing fashion education programs to take account of the structural changes in retail fashion
- Enhance the professional development of fashion educators in relation to eFashion advances.

Threats:

- Continued and increasing competition from off shore pure play and foreign bricks and mortar retailers
- Contraction of fashion education programs as a consequence of funding
- Poor coordination between industry peak bodies
- Global economic downturn forcing European retailers in particular to seek growth opportunities in Asia Pacific
- Australian retailers importing talent in preference to investing in local educational programs
- Slow reaction times in both academic institutions and fashion retail enterprises in Australia.

5. Identifying the Skills and Knowledge Enhancements Required

There are examples of areas in Australian industries where there are weaknesses in innovation, skills, knowledge, experience, policies and/or formal organisational structures to support the ongoing successful development and recognition of individuals and the particular sector.

The focus of all ISS Institute Fellowships is on applied research and investigation overseas by Australians. The main objective is to enable enhancement and improvement in skills and practice not currently available or implemented in Australia and the subsequent dissemination and sharing of those skills and recommendations throughout the relevant Australian industry, education, government bodies and the community.

Specific skill enhancement areas addressed through the Fellowship were as follows:

Skills enhancement area one

Fashion industry practitioners in Australia have a poor understanding of the application of new information technologies in the digital world to enhance shopper's visual fashion on line experience.

- Identify, compare and contrast the current technologies used by leading practitioners overseas and examine possible directions for future development.
- Examine how educational institutions teach and assess in relation to these technology tools.

Action: outline practical ways in which these technological tools might be applied in a fashion retail program in order to provide learners with work ready skills.

Action: collect data from education providers that for analysis with a view to providing recommendations in relation to appropriate education programs and disseminate results to industry.

Skills enhancement area two

Fashion retailers lack competitive skill sets relative to their global competitors in relation to using computer software to create innovative retail and communication platforms on the internet.

- Examine alternative software approaches capable providing effective platforms for retail marketing and communication utilised by benchmark practitioners overseas.
- Assess the proficiency in relation to software applications required by users in entry positions in the fashion retail industry and examine the training provided to current practitioners.
- Examine how educational institutions teach and assess in relation to these technology platforms.

Action: compile a suite of software options for consideration and evaluate the alternative software packages in order to provide draft recommendations suited to the Australian eFashion segment.

Action: collect data from education providers for analysis with a view to providing draft recommendations in relation to appropriate education programs and disseminate results to industry.

Skills enhancement area three

Address a skill deficiency relating to the poor use of the new digital context – specifically the strategic management of the fashion brand in a global environment to enhance the communication of the brand image via web marketing.

- Observe how teaching programs overseas link fundamental (web) marketing concepts with the specific needs of the fashion industry to maximise brand outcomes in the fashion landscape.
- Learn how these programs are taught in an educational environment that address the above deficiency including development of an understanding of the teaching methodologies, delivery

5. Identifying the Skills and Knowledge Enhancements Required

platforms, assessment tools and resources available to trainers overseas.

- Understand the expectations of current managers in the Australian fashion retail industry.

Action: record and interpret these programs and evaluate their appropriateness for Australian eFashion in order to develop effective reaching practices. Provide draft recommendations relating to how these elements might be adapted for the Australian context and applied in a training environment.

Action: document these methodologies and evaluate in the light of industry feedback.

Action: interview current managers in the Australian retail fashion industry and document their views in relation to current (and likely future needs) and triangulate with data collected from overseas educators to establish best practice teaching programs.

Skills enhancement area four

At present there are no Australian tertiary education institutions that provide programs in relation to eFashion. A dearth of skills and knowledge currently exist in relation to this area in the Australian fashion industry. In the rare situations where these skills are present, they are acquired principally through on the job experience, on line self-directed study or study abroad. Australia lacks the knowledge and skills necessary to set up an education program to support industry in order to address the deficiencies.

- Assess and benchmark the current best practise amongst the tertiary institutions offering programs specific to fashion e-tail.
- Examine the pedagogical tools used in the delivery of these programs and establish contacts within the universities.

Action: adapt the most appropriate elements from these programs to construct a teaching and learning program that addresses the current and future needs of the Australian retail fashion industry.

Action: document the learning and teaching methodologies that will yield world best practice results and from which a draft training program can be constructed.

Action: leverage contacts from overseas to conduct further research into the workplace application of digital developments in online fashion retail.

6. The International Experience

Destination: London College of Fashion (UAL) - interviews and research hub

There are six constituent colleges that make up the University of the Arts in London – centred on art, design, fashion and media – one of which is the London College of Fashion (LCF). LCF is organised into four different schools and offers a broad array of programs catering to the fashion industry including: Fashion Communication, (Journalism), Fashion Design and Technology (Design), Fashion Management and Science (Business) and Graduate School (Postgraduate).

Within the School of Fashion Management and Science a range of highly specialised programs is offered including: Fashion Marketing and Promotion, Fashion Branding, Visual Merchandising and Fashion Buying. Each of these four programs currently starts at Foundation Degree (FDA) level but from 2014/15 are being replaced by straight undergraduate degree programs. Business Management and Fashion Management are both degree programs only. Each of these programs offers courses (or 'units') specifically tailored to the program curriculum and conducted across three terms that make up the academic calendar.

Contacts:

- » Mr Matteo Montecchi - Course Leader, BA (Hons) Fashion Management
- » Mr Edwin Phiri - Course Leader, Foundation Degree, Fashion Marketing and Promotion
- » Mr Andrew Hughes - Dean of School of Management and Science.

Objectives:

- To gain an understanding of the approach to eFashion currently undertaken by one of the world's leading fashion management schools
- To gain insights into LCF's view of the future directions appropriate to the field of fashion management education
- To understand the structure, content, methods and testing used in the teaching of eFashion related subjects with a view to being able to compare and contrast with other leading academic institutions in Europe
- Importantly, the study seeks input from interviewees in relation to likely student outcomes and to capture their perspectives in relation to the future application of eFashion in their programs.

Outcomes:

Matteo Montecchi - Course Leader, BA (Hons) Fashion Management (interview)

Structure - The BA (Hons) Fashion Management program is a three year degree program with an optional fourth year in industry placement (taken by approximately 30 per cent of the student cohort). This program is the largest of those offered in the School of Management and Science with an annual intake of 140 first year students. Admission is through UCAS and requires completion of a 'personal statement', together with an interview to assess suitability for this highly business oriented (as distinct from creatively driven) program. Social media accounts may also be examined.

Content - the first year unit 'The Fashion Industry: the Principles of Fashion Management' introduces students to the concept of digital marketing in fashion at an early stage in their learning, examining from a business perspective, the impact of eFashion. The first year unit: 'Fashion Enterprise Management' allows student to set up a live company with seed funding from the college to operate their own online

6. The International Experience

store (a methodology that was strongly endorsed in interviews with Australian digital fashion operators). Second year extends this to examine the marketing impact of digital communication on both business enterprises and consumers. The unit 'Fashion Business Research' exposes students to the analysis of data generated by online fashion environments. The third year unit 'The Future of Fashion - A Business Perspective' looks at the convergence of business models and digital communication through a series of themed modules. Students management of their digital footprint and legal, ethical and regulatory issues associated with social media platforms are also covered.

Methods - Lectures, workshops and tutorials are the principle teaching and learning methods designed to encourage student discussion and independent research. Each of the core themes in the third year unit 'The Future of Fashion' is delivered by specialist lecturers, some from outside the college as visiting lecturers. Guest speakers deliver presentations to students 15 times each year from a variety of the world's leading retail, fashion and business companies. While intellectual and cognitive development are core aims throughout the program, students are instructed in the practical application of digital skills via MS Excel, various web analytics packages and the development of digital portfolios through Adobe CS. Facebook groups are used to support the learning environment together with apps to provide instructors with real time feedback from students.

Assessment - essays, exams (multiple choice and essay questions), reports (individual and group), case studies, presentations and a final dissertation form the core assessment methods. In first year the assessment tasks are knowledge based to test students understanding of management competencies in the fashion industry. Year two assessments are more of a practical nature with an industry focus. Third year assess students higher level skills in relation to critical thinking, synthesis of ideas and ability to evaluate.

Student Outcomes - the program is designed to be vocationally relevant to prepare students for employment or to respond to professional opportunities or for further study. The program is informed by industry operatives who place a high emphasis on the digital fashion agenda. Students graduate from this program with highly transferable generic skills and typically move into careers in two distinct directions: in buying and merchandising or fashion marketing, PR, advertising and promotion and journalism.

Perspective - Montecchi is a strong advocate for the inclusion of eFashion as a key component to be embedded in the curriculum of fashion business education. He observes that the industry is "in the middle of a revolution" and that the experts in this sector are those who are currently operating in digital fashion roles in industry - not the academics who are teaching today whose careers have come via a route that didn't include eFashion. The industry no longer sees the digital elements of fashion as a stand-alone or separate area- they are now a key interconnected part of any job function for fashion graduates, according to Montecchi. He believes that LCF has struck an optimum blended delivery with career academics responsible for development of the theoretical underpinnings and 'Practitioners in Residence' (piloted in 2013) to support the program with up to the minute industry best practice. Further, Montecchi suggests that while today's 'digital natives' have a strong base level knowledge of digital communication platforms, the program should seek to guide students towards appropriate strategic business applications of the technology. Finally, he believes that industry needs to evolve to take a more strategic view of eFashion, rather than simply hiring interns to complete one-off operational tasks.

A key issue identified during the interview was the dynamic nature of the concept of eFashion where technology based delivery platforms (particularly social media) ebb and flow relatively quickly. This makes the development of an up-to-date educational curriculum problematic – particularly in view of the fact that degree validation requirements place strict controls on the extent to which programs can be altered within five years of validation. Institutions involved in the delivery of programs in fast moving digital technologies therefore construct a generic framework within which content can be tailored each year to adjust for environmental changes.

6. The International Experience

Edwin Phiri - Course Leader, Foundation Degree, Fashion Marketing and Promotion (interview)

Structure - the Foundation Degree is structured very similarly to the Australian model of an Associate Degree. The program has a greater emphasis on the promotional and marketing aspects of fashion business where typically Australian programs take a more holistic approach covering a broader diversity of business related fashion industry concepts. In other words, the LCF foundation program is more highly specialised; and as such has a smaller student intake than would be viable of a stand-alone program in most Australian fashion education institutions. Students applying for the program are screened via group interviews. Like Australian TAFE programs, the Foundation Degree is vocationally based and taught by a combination of associate lecturers drawn from industry for their particular expertise, together with qualified academics.

In 2014/15 the Foundation Degree will be discontinued in favour of a new three year bachelor degree in Fashion Marketing and Promotion.

Content - in moving away from the two year Foundation Degree to a full three year bachelors program, LCF has removed the unit 'PR and New Media' from the program and now will integrate 'eFashion' across several marketing based courses including a third year unit 'Marketing Futures and Innovation'.

Methods - in relation to methods, courses contain a blend of traditional lectures, seminars and workshops intended where possible to simulate industry scenarios. Students frequently work collaboratively with industry partners on 'live' projects as a practical application of course content.

Assessment - general testing of students comprises of the compilation of formal written reports (both individual and group) and oral or video presentations in preference to time constrained tests - again in order to simulate industry situations and better prepare industry ready graduates in relation to procedural application.

Student Outcomes - because of its orientation, graduates from the Foundation Program at LCF typically enter roles supporting PR and new media within agencies, fashion retailers and design houses - albeit with the intention of providing students with a diverse range of career options.

Perspective - Phiri expresses the view that students at the foundation (or Associate Degree) level require a holistic and broad based exposure to the fundamentals of eFashion. Detailed strategic and operational content is more appropriately delivered at a higher education level.

Andrew Hughes - Dean of School of Management and Science (Moderated Research Hub)

The opportunity arose for the Fellow to participate in the School of Management and Sciences' 'Research Hub' (this was not a planned activity of the Fellowship study) - an informal meeting of academics held quarterly to discuss their current research projects in a collegiate forum.

The key finding relevant to the current study reveals that, like many advanced industrial economies, the (labour intensive) manufacturing end of the fashion supply chain has all but disappeared in the UK in favour of more competitive emerging economies in Asia, Eastern Europe and the Middle East.

Guest speaker at the forum Mr Chris McHugh, UK Production Manager for the Design / Manufacture Innovative Support Scheme (DISC), outlined the purpose of the DISC scheme, which is to provide small fashion businesses with access to a team of highly skilled manufacturing experts to assist in establishing apparel supply chains in the nascent stages of a company's development. The scheme's dual aims are to foster a resurgence in specialised valued added garment manufacturing in the UK to take advantage of the rising costs in many traditional off-shore sourcing destinations and to assist embryonic fashion entrepreneurs (not unlike the BFC's New Gen Scheme for talent identification).

6. The International Experience

This scheme may be of interest to peak bodies in the Australian fashion industry - where young designers face similar challenges. Further information is available at <http://www.fashion-manufacturing.com/about/>

Destination: Instituto Marangoni (London) - interviews and observation

Founded in Milan, the world's fashion design centre of excellence, Instituto Marangoni is a private college operating for more than 70 years and specialising in fashion creation, communication and management. The college has expanded in recent years with campuses now in London, Paris, Milan and Shanghai. Tuition fees are high and students are provided with a prestigious standard of facilities both from an academic and aesthetic standpoint. With a high proportion of international students, the programs offered range from foundation and short courses through to bachelor and post graduate.

Paradoxically, fashion courses are rarely offered in Italian public universities where the approach to tertiary education is highly conservative. The fashion industry has traditionally been fed by a craft based (almost artisan) vocational education sector which is strongly product and production focussed. And therefore a small number of private sector operators fill the void in the delivery of post-secondary fashion design and business programs.

Being a private RTO, all program specifications are required to be validated by an external licensed provider. In the case of Marangoni, Manchester Metropolitan University (UK) validates their programs through a rigorous ongoing approval process in order to maintain the academic standards required by QAA. This impacts the college's ability to alter its programs in the short term.

Contacts:

» Fabio Ciquera - Program Leader, Fashion Business Department, Instituto Marangoni.

Objectives:

Marangoni approaches fashion education from a perspective that differs to the public universities by virtue of private ownership and its Italian heritage. The interview subject does not teach in the Digital Marketing course and was chosen with the specific knowledge that the perspective offered was likely to be one which strongly contrasts with those of others involved in fashion education in Europe. The aim of the interview therefore, was to gain an understanding of these differences in order to compare and contrast with alternative approaches and specifically against the courses conducted at the Milan campus. The interview broadly examines the approach that Marangoni currently adopts in relation to eFashion and its relative weight in current and future course content. Structure, content, methods and testing used in the teaching of all programs are examined with eFashion content in mind. Importantly, the interview seeks to capture the subject's personal perspective in relation to the future application of eFashion and its importance in the fashion industry in the future.

Outcomes:

Fabio Ciquera - Program Leader, Fashion Business Department, Instituto Marangoni (interview)

Structure - the Fashion Business BA (Hons) degree is a three year program comprised of four basic units delivered per academic year each comprised of four to five separate subject themes.

6. The International Experience

Content - fashion marketing and industry principles (including MS Office) form the basis of first year. Second year is structured around brand identity and communication, marketing strategies and finance and management. Third year introduces fashion retailing (buying and retail management) and digital marketing and is strongly oriented towards strategy development as distinct from a practical application.

Methods - lectures and workshops form the basis of the teaching method. However, with a substantial proportion of international students, some adjustment is made for culturally different approaches to teaching and learning (e.g. through the use of video presentations and store visits emphasising experiential and kinaesthetic learning and minimising auditory channels). Student interaction is encouraged but difficult to achieve.

Assessment - mastery of independent problem solving and innovation is emphasised ahead of digital skills and is reflected in assessment tasks.

Student outcomes - many students graduating from Marangoni are destined for the merchandising departments of fashion and luxury brands. Foreign students, however, are restricted from finding positions in the Italian industry without Italian language skills. Positions in PR, communication and marketing departments within fashion houses are other probable outcome with retail careers of somewhat less importance. Online functions such as Search engine marketing (SEM), Search engine optimisation (SEO) and analysis of metrics are not generally recognised as potential career outcomes.

Perspective - Marangoni is very 'Italian' and intrinsically linked to Milan's fashion design heritage (as distinct from a fashion business orientation). This is important in understanding the college's approach to eFashion and is reflected in the course content which emphasises a 'classical' view of management of the design function in a luxury brand context. This represents a significant philosophical distinction to the UK universities where programs place greater emphasis on retail channels as the primary connection between the brand and the consumer; hence a stronger orientation towards the use of digital platforms as an emerging conduit. Put simply, London is the retail capital of Europe, where Milan is the design capital and this impacts program orientation and course content.

While acknowledging the emergence of eFashion, Ciquera's personal disdain for the impact of digital technologies on consumer relationships in the fashion industry is evident in the interview. He expresses strongly, the view that personal one to one engagement of the retail fashion experience should take precedence - particularly in the luxury brand segment. Generally, the London program leader emphasises the offline environments placing them ahead of online - exemplified by the fact that Photoshop is not part of the program with the focus being on the development of creative strategies as opposed to creative technologies.

It appears that Marangoni's reliance on the external validation process may partly explain the slowness to respond to the emergence of eFashion. However, equally, the college remains wedded to a classical perspective of fashion linked strongly in a sociological sense to its Italian heritage that takes a fundamentally different approach to fashion consumption.



6. The International Experience

Destination: University of Winchester - interview

The University of Winchester is located in the south east of England and is a relatively small institution having been awarded university status in 2005. It is well placed in the UK league tables. The university is divided into four schools, one of which is the Faculty of Humanities and Social Sciences which includes the Department of Applied Social Studies through which the BA (Hons) Fashion, Media and Marketing (FMM) is offered. This three year program takes a multidisciplinary approach drawing from the three contributing discipline areas of fashion and media and marketing. Students are provided with exit points at the end of first year, Certificate of Higher Education; second year, Diploma of Higher Education; and third year, BA (Hons/Pass Degree). The program accepts between 50 to 75 students annually from a pool of approximately 250 applicants; all of whom are individually interviewed.

Contacts:

- » Dr Savithri Bartlett, Program Leader BA Fashion / Senior Fellow (Knowledge Exchange), Department of Applied Social Studies, University of Winchester

Objectives:

The University of Winchester FMM program was selected for inclusion in this research project due to its unique place in fashion education. Unlike the other universities examined in the study where fashion programs are offered in business, design, technical and technology streams, Winchester's FMM is a stand-alone fashion course clustered around a diverse yet closely related set of humanities subjects including: applied social studies, archaeology, history, psychology and theology and religious studies. This results in a program of a highly distinctive character and a decidedly different program, the main themes of which are drawn from its eclectic multidisciplinary academic environment.

The interview seeks to understand the relative importance that Winchester places on these themes and where the concept of eFashion fits within their view of fashion academia given the orientation of their program. Of specific interest is the approach that the program takes to its highly collaborative teaching method.

Outcomes:

Dr Savithri Bartlett - Program Leader BA Fashion / Senior Fellow (Knowledge Exchange), Department of Applied Social Studies, University of Winchester (interview)

Structure – first year is foundational and provides the basis for more specialised study in years two and three, introducing students to the key theories, concepts and perspectives within the topic of fashion, media and marketing 'Manipulating Media' being one of the key first year units. Year two builds on first year to provide further insight into specific topics related to the fashion industry such as fashion promotion and fashion trend forecasting, developing journalistic and feature writing skills and entrepreneurial skills establishing sound research capabilities and understanding of the research process in fashion marketing. Third year was conceived to encourage students to work in a more independent manner and to consider their career options upon graduation. In this respect, students are given the opportunity to develop a deep understanding of innovation and creativity and the program is designed to encourage the students to bridge their academic and generic skills to meet the requirements of the employment market.

Content - BS2964 New Media Marketing is a mandatory unit offered to students in second year of the program. Essentially the course deals with advertising for the post-modern consumer to understand

6. The International Experience

the importance of experience and engagement. The unit examines new media through a conceptual framework rather than that of an operational nature or through practical application. In other words, the topic is approached almost exclusively from a theoretical and strategic perspective. Media, writing journalism and entrepreneurship are included in the program while Photoshop, Illustrator and Excel are excluded. Merchandising and buying related units are also omitted.

Tasks – the course centres on identification, analysis and application of the key concepts and practices of new media marketing. Students are required to compare a range of new media marketing approaches to the attracting of consumer attention, traffic building and the retention of customers and to appraise the new media marketing strategies and practices of an organisation. Analysis of the different ways of measuring new media marketing effectiveness is also touched on.

Methods – the program uses a broad range of delivery techniques. Within the New Media Marketing unit, the primary method is via lectures and seminars and individual and small group tutorials. Students are encouraged to take ownership of their learning through a range of formal and informal mechanisms (e.g. online and social media environments) provided by the university in a highly self-directed manner taking advantage of peer to peer learning opportunities.

One of the most striking features of the program is the use of ‘team teaching’, using the specific skill sets of lecturers from outside the faculty to deliver (often) one-off presentations of a highly specialised nature enabling students to witness a depth of knowledge, passion and intensity that can only be delivered by those intimately immersed in their subject matter. This collegiate teaching approach maximises the benefits of a multi-disciplinary structure, providing students with rich, often opportunistic, learning experiences.

Assessment - the large variety of assessment tasks used are intended to stimulate students and to maintain their interest. The suite of tasks has been developed to assess learning outcomes specific to each course and to assess the skills and knowledge of the programme at different levels suitable to academic study and the work place. The New Media Marketing module is tested formatively and summatively through the development and presentation of a group report requiring students to compare, contrast and identify new media approaches and by analysing and appraising their effectiveness.

Student Outcomes – graduates of the FMM program enter a wide range of careers in marketing, branding, public relations, event management, fashion journalism, fashion forecasting, retailing, visual merchandising, fashion research and trend forecasting. The career outcomes are general rather than specialised and reflect the multi-disciplinary approach of the program.

Perspective:

Where other universities have created a distinctive position in the fashion education market based on such variables as location (London), proximity to industry (Milan) and the like, The University of Winchester have created a highly differentiated market position based on an almost unique philosophical view of (consumer facing) fashion education. The manifestation of this view is most evident in their approach to the nature of fashion and the functions involved in fashion media and marketing – as distinct from the business perspective taken by other universities (e.g. at Winchester students study fashion sociology to understand theories of consumption, culture and gender; they also study history in order to critique the present; and they can access the expertise of the archaeology department to appreciate the nuances of couture in the classic Greek and Roman eras).

At the end of the interview and to illustrate the extent of Winchester's evolution to a more highly integrated and collaborative teaching style, Bartlett points out that the programs' teaching method would be more correctly described as one of an ‘inter-disciplinary’ approach rather than multi-disciplinary; the latter implying a lower degree of cooperation and teamwork.

6. The International Experience

Whether students leave the program more or less digitally capable than other graduates is uncertain. However, the program is popular and attracts both a bright student cohort and deep pool of teaching talent who deliver a fashion media and marketing curriculum that has been well built for its purpose.

Destination: University of South Wales - interviews and observation

The University of South Wales is the result of a merger between The University of Newport and The University of Glamorgan that took place early in 2013. Based on the polytechnic model and focused on the creative industries (as distinct from fine arts), relationships and rapport with industry are a key driver. The university offers three fashion programs. Only two of these are of relevance to the current study, including BA (Hons) Fashion Promotion - oriented slightly towards creative communication and BA (Hons) Fashion Marketing and Retail Design, oriented more towards fashion business.

Contacts:

- » Ms Patricia Brien - Course Leader BA (Hons) Fashion Promotion, University of South Wales
- » Ms Jemma Oeppen - Faculty of Business and Society, University of South Wales
- » Ms Gemma Peterson - Faculty of Creative Industries University of South Wales

Objectives:

- To examine the approach that the University of South Wales currently adopts in relation to eFashion
- To canvas opinions from the teaching faculty regarding likely future directions appropriate to the field of fashion management education
- To understand the structure, content, methods and testing used in the teaching of eFashion related subjects with a view to being able to compare and contrast with other leading academic institutions in Europe
- Importantly, the Fellow sought input from interviewees in relation to likely student outcomes and to capture their perspectives in relation to the future application of eFashion in their programs.

Outcomes:

Patricia Brien - Course Leader BA (Hons) Fashion Promotion, University of South Wales (Interview)

Structure - the BA (Hons) Fashion Promotion program is a three year full time program leading to a fourth year honours degree. The focus is on omni-channel communication across integrated media platforms using a mix of short term modules of one term duration with others extending across a full semester. Student applications are based on UCAS scores and preliminary interviews.

Content - students follow a prescribed content with limited choice of optional modules (changing in 2014). Theoretical introductions are covered in the first year, practical applications in second year and third year concentrating on research in communication and entrepreneurship.

Methods - a wide array of teaching methods is applied, appropriate to the blend of technical, practical and theoretical content and generally includes lectures, workshops, tutorials, presentations. Applied learning opportunities of a 'hands-on' nature are highly valued that enable students to demonstrate the acquisition of requisite skills.

6. The International Experience

Assessment - program structure with both short and long modules provides students with multiple submission points rather than a concentration of assessments at the end of term. This leads to better quality outcomes with less stress.

Student Outcomes - limited opportunities with larger firms exist in Cardiff but several openings exist with local design houses and artisan manufacturers, particularly on a freelance basis. Some students shift to London for positions with major retailers. Blogging, social media management and management of online media content are common graduate roles. Graduates compete in the job market with candidates from journalism, graphic design and retail marketing and to a lesser extent film and television and fashion design.

Perspective - this program has a strong communications focus and emphasises the acquisition of a breadth of practical skills (multi-skilling to guarantee graduate flexibility) relating to content management using social media and traditional media platforms with a strong focus on technical aptitude. The interviewee strongly advocates the development of relationships with recent graduates and industry entrepreneurs as an opportunity for students to witness how the “new breed of creatives” is working.

Gemma Peterson - Faculty of Creative Industries University of South Wales (interview)

Gemma speaks on behalf of the BA (Hons) Fashion Marketing and Retail Design program - the BA (Hons) Fashion Marketing and Retail Design program evolved from BA (Hons) Fashion Promotion via a two year development process and now exists as a new separate stand-alone program albeit in a nascent form.

Structure - much of the first year content in the new program is common with the Fashion Promotion program including shared assignments, in order to build an appropriate theoretical foundation and develop skills specifically in relation to some of the core technology.

Second year builds on these core skills through practical application of the technology. Third year again being research focussed. A further benefit of shared core elements between the programs is that they are designed to provide students with a broad cohort with whom they may collaborate in their final year projects simulating cross functional work place relationships.

Content - generally content is highly prescribed with some optional content in second year but with limited choices. Some opt in / opt out scope exists in relation to a small number of common core units. eFashion is given a higher profile in this program with specific units dealing with e-commerce and m-commerce.

Methods - live projects with industry partners form a key part of the program delivery while tradition methods are still heavily relied on during the transitional period.

Assessments - where core units are shared, assessment tasks may be customised to an appropriate context so that Fashion Promotion students may be assessed on different criteria from Fashion Marketing and Retail Design students. This is to promote shared learning and enhance knowledge transfer through the exchange of ideas encompassing the whole retail fashion value chain from the separate fashion programs.

Student Outcomes - being retail oriented, buying and merchandising positions are the most likely graduate outcomes and generally within a structured [pre-existing] environment - unlike Fashion Promotion graduates where outcomes fall more in the entrepreneurial sphere. Digital media management, data analysis, social media monitoring, e-commerce planning are also possible outcomes. Graduates compete in the job market predominantly with candidates from business programs.

6. The International Experience

Perspective - the interviewee, while acknowledging the growth in digital technologies as an engagement platform, places a personal high value on the development of interpersonal, communication, selling and customer service skills in a retail fashion program; this being at the core of the customer relationship. She perceives strong future opportunities for graduates from her program to collaborate with 'gamers' in the development of 360 degree digital avatars for use in digital product demonstration and for engagement with architects and interior designers in both offline and online contexts. Given the embryonic nature of the program, she remains reserved in relation to future eFashion education directions though believes strongly in the consumer behaviour and understanding the psychological aspects of engagement, interaction and the retail experience. Peterson also expresses the view that it is important to develop a unique identity, a unique selling point for any new program developed in the eFashion space.



6. The International Experience

Destination: The University of Manchester - interview

The University of Manchester ranks in the top quintile in the UK University League Table (2014) and is at the forefront of eFashion education with a well-developed program that is both deep and broad and delivered by highly regarded instructors. The university's Fashion and Textiles Retail program takes a multidisciplinary approach covering applied management, technology and design with a strong emphasis on entrepreneurship and is broken into two streams: business and clothing (sharing common modules but providing students with opportunities for specialisation). Required A Levels for this program are high and all students applying for the program are screened via interview.

Contacts:

» Dr Helen McCormick, Lecturer, Fashion and Textiles Retailing, University of Manchester

Objectives:

The fashion programs at the University of Manchester had their origins in an era when textiles technology and the technical aspects of the fashion industry were taught in a technical college environment. Over time this has since been consumed by the current structure with a program characterised more by its research reputation and teaching credentials.

The University of Manchester eFashion program is something of a benchmark in eFashion education and offers a significant opportunity to inform this research project in relation to best practice. The objective of this interview was to examine the approach that the university adopts in relation to eFashion, with specific reference to its evolution, structure, content, methods and testing. Academics delivering this program are highly active in research in the field and offer an important perspective with particular regard to likely future directions.

Outcomes:

Dr Helen McCormick - Lecturer, Fashion and Textiles Retailing, University of Manchester (interview)

Structure - a three year program is offered with each year broken into two 12 week semesters, students may apply to extend their degree to a fourth year which entails either industry placement (a key source of job offers) or study abroad. First year contains mostly core units common to both streams of an introductory nature. Second year provides more diversification though core units covering fundamental aspects relevant to both streams are specified. Third year introduces both streams to e-commerce and eTailing as a core unit taught across two semesters.

Content - technical instruction is limited to Adobe Creative Suite but not the IT side of eFashion. McCormick points out that there is some demand from students and industry for web design but more likely this would be put into a post graduate course.

Methods - the program is taught via project based assignments, lab classes, lectures and studio work in a cross disciplinary environment. Specifically, eFashion is delivered via two hours of lectures and a one hour seminar per week for one semester.

Assessment - eFashion is assessed by examination (70 per cent) which is highly academic (note - this is a third year unit) and course work (30 per cent). Multichannel Retailing is assessed fully by coursework through the development of an integrated marketing plan.

6. The International Experience

Student Outcomes - the program emphasises multi-skilling and the ability to operate as part of a multi-functional team. Most students enter the program with fashion buying as their goal which often changes when faced with maths and data analysis courses and thus marketing and retail management are now also common career outcomes with many moving into social media management, blogging and online marketing management in a fashion retail context. McCormick stresses the importance of enthusiasm and passion as key drivers for employment and identifies graduates from marketing, graphic design, web design and journalism as being key competitors in the entry level job market.

Perspective - Dr McCormick is well published in the field of eFashion and strongly recognises the structural change taking place in fashion retail as a result of factors such as globalisation and the impact of new technologies and sees continued growth in the need for technologically equipped graduates as a consequence. Believing that multi-channel retailing is the way of the future, McCormick expresses the view that Australian fashion retail is experiencing similar changes to those that occurred in the UK around five or six years ago and can learn from this experience to promote growth in the sector, particularly amongst previously hard to reach segments. The growth in sales of mobile devices will further fuel the development of the sector for retail and therefore requires investment from an educational viewpoint. McCormick is a strong advocate for links with industry as a source of program refinement - particularly those at the operator rather than executive level.



6. The International Experience

Destination: Istituto Marangoni (Milan) - interview (course specific)

A private provider of training in the sector, Marangoni caters to the gap in the market between the conservative Italian public universities and the 'atelier' styled coaching provided by the Italian fashion houses. As outlined earlier, the quintessentially Italian heritage of Istituto Marangoni impacts the college's strategic orientation in relation to fashion education. And while Marangoni has expanded their footprint to now encompass campuses in London, Paris and Shanghai, the focus appears consistently Italian regardless of the cultural environment where the teaching takes place.

The Milan campus claims amongst its famous alumni, Domenico Dolce (Dolce and Gabbana), Alessandra Facchinetti (creative director at the House of Valentino and later Gucci) and Franco Moschino.

Contacts:

» Mr Paolo Meroni - Director of Education, Istituto Marangoni

Objectives:

Marangoni's approach to fashion education, a function of private ownership and Italian heritage, provided the context for the meeting with Paolo Meroni. The primary aim of this interview was to understand the rationale for, and the specific features of, the programs' digital fashion content delivered through the third year course, 'Digital Marketing'. The Fellow sought to understand the structure, content, methods and testing used in the teaching of this specific course. However, a secondary motive had become apparent following the earlier interview conducted at Marangoni's London campus.

Hence, a further goal was to capture the perspective of the college's Director of Education in relation to the future application of eFashion in their programs and its importance in the fashion industry in the future taking account of the college's unique point of view. The subject speaks with authority on behalf of the college, having more than 20 years' experience in fashion education and provides a contrast to the Marangoni London meeting which offered a more personal perspective from a key industry operator.

Outcomes:

Paolo Meroni - Director of Education, Istituto Marangoni(Interview)

Structure - Digital Marketing is taught in the final year of the three year BA (Hons) Fashion Business degree and is offered at all campuses except Shanghai. Conducted over one eight week term, the course contains 24 lessons delivered three times per week over the term.

Content - the course deals with the basic principles of online marketing, basic HTML and web page design, semiology and strategy development.

Methods - class sizes are small (20 students) and formal lecture / workshops are supplemented with guest speakers from the digital department of some of Italy's leading fashion houses (Gucci regularly collaborates). Students participate in digital communication simulation exercises as a group project. The college aims to employ industry practitioners to complement academic professionals in the delivery of content. This ensures that content and themes remain contemporary, a key variable in the delivery of technology rich courses.

6. The International Experience

Perspective - the college is developing several new programs for commencement October 2014. Digital Fashion Design is a modification of the current masters program and is a one year postgraduate program focusing on the creative and technical aspects of web page development for fashion brands and is aimed at students with strong (prerequisite) skills in allied areas such as Fashion Communication and New Media (a three year undergraduate program encompassing fashion editorial, video imagery, digital PR, blogging and online fashion marketing).

Meroni expresses the view that students graduating from the college require a strong grounding in the fundamentals of fashion business and with only a broad based understanding (rather than mastery) of eFashion. He advocates for sound strategic frameworks that can be later supported through enhanced specialised programs. To this end Marangoni offers frequent short courses to supplement the skills of those already operating in industry as a key element in the college's business model.

Destination: SDA Bocconi – Milan

Contacts:

- » Dr Stefania Saviolo -Professor of Management in Fashion, Luxury and Creative Companies, Università Bocconi and SDA Bocconi School of Management

SDA Bocconi University, one of the top business schools in Europe, is a private university in Milan and is ranked by many leading publications (Forbes, Businessweek and the Financial Times) in the top quintile of business schools in the world (Financial Times, 2013). Renowned for educating Prime Ministers and ministers, leading economists and the who's who of European banking, the school offers programs from under graduate to post graduate. Previous graduates have taken management positions within the leading fashion houses in Italy and are thought to be key influencers in global fashion marketing directions. SDA Bocconi is a business school and does not offer fashion programs.

Objectives:

The Bocconi perspective is significant to this study, providing an important contrast to the views expressed by operators from the more retail fashion oriented programs in the UK. The conservative history of the school is reflected in the nature of the courses delivered and the views expressed in the interview.

The college's focus is less on the creative arts and more on the creative development of business models. Their programs are not specifically retail oriented, as mass market retail is not a key competence of Italy (unlike the service driven economies of London or New York). Similarly, digital technology is regarded not as a focus but simply as a support, an enabler or a facilitating commodity to deliver sound business strategies.

Student Outcomes:

Many graduates enter merchandising positions within the international fashion industry (not specifically Italian firms). It is noted that where merchandising in the UK is defined as a 'buying' function, in Italy the term defines a function that provides direction to the design team in terms of range development, merchandise planning and management of open-to-buy. Regardless, both are highly quantitative roles. Saviolo states that only 10 per cent of graduates move into roles specifically relating to social media or ecommerce.

6. The International Experience

Perspective:

Saviolo believes it is vital to develop the 'story telling' element before firms invest in technology. She suggests that there are many firms that one can outsource the technology / delivery to but they are little help with the refinement of fundamental business strategies. To illustrate this argument, the subject points to Prada, one of the world's most successful fashion brands both commercially and creatively. The brand has no social media presence, no ecommerce facility and until only three years ago, had no web site. As is noted in the interview, "little wonder then that online sales account for three to five per cent of Italian high end luxury brands (compared to 25 per cent for the High Street brands in the UK); the more money you spend the more human contact you want". Saviolo advocates that while technology plays a stronger role at the commodity end of the fashion retail chain, in luxury it is important only as an enabler, as an external force and as such those who deliver these technologies, the platforms, the new solutions will be external to the industry (and in the case of Italy, possibly even external to the country due to a quasi 'country-of-origin' effect). She acknowledges that the online information search is becoming increasingly important in all elements of the retail spectrum.

Saviolo strongly expresses the view that the next major battle ground in fashion retail will be in relation to retail training and cites evidence from major global high street brands showing significant investment in this area. This is in order to provide a point of difference between the online and offline shopping experience to provide consumers with a reason to visit bricks and mortar stores. She articulates the current thinking prevailing in Italian fashion that the more money companies invest downstream, the less they invest upstream. In Italy, the belief is that the more the fashion industry turns to the retail side of the industry, the less emphasis will be placed on creative and productive resources upstream and the competitive advantage will be lost.

The interview concluded with a chance encounter with a former Bocconi masters graduate, Martha Belotto who now manages the main Louis Vuitton flagship store in Milan and offers her perspective in relation to eFashion and the use of technology in her environment. Belotto's view echoes the sentiments expressed earlier by Saviolo; primarily that the technology is simply a conduit. Many customers have searched extensively online prior to entering the store and that human engagement is a primary motivator for store patronage.



6. The International Experience

Concluding remarks:

Interviews conducted at educational institutions overseas have provided the Fellow with a broad diversity of opinions and directions in relation to eFashion education and a deep understanding of the opportunities currently being presented to the Australian market.

Clearly, the internet and mobile technologies have reduced the cost of communication and allow small players the opportunity to participate in global commerce. And while globalisation sees many of the world's leading fashion retailers enlarging their footprints through global expansion, it is also ecommerce which provides the smaller players with their strongest opportunity.

That Australia lags behind other leading ecommerce nations has been well documented. This failure to adapt business models and retail infrastructure to the changing landscape is replicated in the educational sphere where approaches to ecommerce in retail and fashion programs is equally underdeveloped.

The educational sector in Victoria in particular, has a special responsibility to ensure that students participating in business oriented fashion programs are provided with a strong exposure to the digital technologies that are currently revolutionising fashion retail and consumer engagement generally. Indeed Melbourne, long recognised as the retail capital of Australia, risks losing this status as the small independent fashion retailers upon which this reputation was founded, are slowly eliminated by the onslaught of a broad swathe of international retailers. The fashion capital of Australia risks becoming an undifferentiated backwater proffering the same fashion offer as every other major capital city in the world. The city's ability to draw tourists to its retail sector risks substantial deterioration.

The Fellow acknowledges the restrictive boundaries within which many educational providers in Australia operate and that many lack the ability to respond to the opportunities being presented in the short term. To this end the outcomes of the program can best be optimised by bringing together educators, peak bodies and industry to work cooperatively to secure the industry's future.

7. Knowledge Transfer: Applying the Outcomes

The Fellow's examination of eFashion educational programs in the UK and Italy provides an up-to-date and comprehensive outline of the breadth and nature of programs offered through a range of educational institutions. The research highlights the influence of cultural nuances that impact the form and content of eFashion learning. Most importantly, it is evident from the Fellow's research that the orientation of the business models that prevail in a country are a significant guiding influence on the directions that eFashion education are likely to take: chain store retailers versus artisan providers; High Street versus luxury; producers versus sellers. In the case of the Australian market, we have the opportunity to set our own direction, ideally in support of both up and coming Australian fashion designers as well as in support of the fragile independent fashion retail segment; a vital microcosm in the delicate fashion ecosystem.

Together with input from current operators in the Australian retail fashion sector, Cooper identifies several areas of specific application for the sector. These key outcomes of the Fellowship may be summarised as follows:

- Identification of key curricula for instructors and assessors involved in designing and developing courses for the VET and Higher Education sectors based around eFashion
- Identification of delivery and assessment strategies that provide a foundation upon which future fashion courses may be built
- Sharing the skills and knowledge with other stakeholders.

It is important that the insights collected by the Fellow are shared amongst both industry practitioners and teaching professionals in order to ensure that graduates from Australian fashion schools remain competitive with their international counterparts. To this end the Fellow is arranging to present the key findings from the research at several industry events including:

- A contextualised presentation to teaching staff through the RMIT School of Design and Social Context
- In conjunction with the TFIA industry association, a presentation to professionals from the textiles, clothing and footwear associations at a date to be advised
- Through the Textiles and Fashion Hub, in conjunction with the TFIA and Kangan Institute, a presentation of findings to educators from fashion universities, TAFE colleges and other RTOs
- Via a conference paper being prepared in collaboration with co-authors from the London College of Fashion (through the UAL)
- Via course content in the Associate Degree of Fashion and Textiles Merchandising delivered at RMIT University
- The Fellow is also looking to disseminate the findings through the Victorian TAFE Association and TDC
- Cooper is actively seeking additional speaking engagements within the fashion industry and fashion education sectors.

The Fellow has now established a sound understanding of the key issues impacting eFashion education on a global basis and a broad base of industry contacts. That a 'one size fits all' solution exists is irrevocably dismissed and as such the Fellow is willing and able to assist others in identifying the essential elements required in the development of a customised pedagogical strategy.

8. Recommendations

Government:

- Governments, both Federal and State, must recognise the competitive advantage that emerging technologies offer to small business in the fashion retail segment by offering (short term) incentives to employers taking on graduates
- Governments must ensure sufficient funding is available to learning institutions for the supply of facilities, staff and equipment required for the delivery of programs
- At the local level, the City of Melbourne has a strong pecuniary interest in ensuring Melbourne continues to flourish as the fashion retail capital of Australia. A strong case can be made by the peak fashion bodies that, in order to secure Melbourne's place in the global retail order, the Council should be seeking to invest in the enhancement of eFashion skills of industry operators.

Industry:

- Industry stakeholders that stand to benefit from the increased impact of eFashion must be encouraged to lend limited financial support through scholarships, in kind support and work placement opportunities
- Industry must be encouraged to work more closely with local education providers to facilitate on the job training opportunities through internships and scholarships in order to fill skill shortages rather than recruiting overseas
- Industry and other key stakeholders must take an interest in the development of students through work integrated learning opportunities and (live) industry based case studies to assist in the contextualisation of learning outcomes
- The lack of interest shown by many Australian fashion retailers in relation to the development of their eFashion skills is profound. An immediate change in behaviour is required if many are to survive. This can be encouraged and fostered through industry peak bodies, trade groups and professional associations.

Education and Training:

- Education operators must make key strategic decisions in relation to the fundamental orientation of their programs, that is, the extent to which the program is driven by creative fashion outcomes or business oriented fashion outcomes. These outcomes will be informed by students enrolling in the programs and the industry into which graduates will be fed. The orientation of the program must then define content and context in relation to teaching methodologies, curriculum and assessment
- Opportunities exist for both specialised training in specific skill areas relating to the application of eFashion technology as well as generalist holistic courses that have yet to be capitalised by training institutions
- Education and training bodies must map competencies across frameworks to ensure that the most up to date skills sets align with the evolution of industry needs
- The development of opportunities for short courses and structured programs from Certificate to Diploma level delivered by RTOs such as industry peak bodies and industry associations must continue to evolve in line with industry needs and global benchmarks
- Universities and TAFE colleges have been slow to react and surrendered market share to private RTOs (including those operated by industry associations and professional associations). Lead times in the development of courses are causing these intuitions to be uncompetitive. Shortcuts need to be created (e.g. creation of validated program shells populated by flexible content) in order to ensure

8. Recommendations

that higher level skills continue to develop to support lower levels of eFashion training

- Creative collaboration is to be encouraged between higher education providers (Universities / TAFEs) and RTOs operated by industry and professional bodies to ensure globally recognised qualifications are available to industry professionals wishing to upgrade their credentials to bachelors and postgraduate levels from the current diploma levels
- Closer working relationships are required between education and training organisations, industry associations and the fashion industry to identify guest speakers, skilled facilitators and qualified instructors to participate in the education process
- Software tools must be customised to complement the program's orientation. None of the colleges examined in the study addressed software from the programming end and software training should therefore be approached from the operator point of view
- Educational providers must make more efficient use of internal resources through team teaching to fully utilise the skills within their faculties to enhance the learning experience and skills outcomes.

Professional Associations:

- An immediate and critical need exists for a bridging committee to establish the joining of retail peak bodies with fashion peak bodies to better represent the (unique) needs of fashion retailers, particularly in relation to the development of digital skill sets
- The TFIA, in collaboration with the Victorian state government, must seek to establish a joint working committee to promote the enhancement of digital skills amongst both fashion graduates and current industry operators. The development of a commercially competitive ecommerce site and a sound business model can provide Victorian fashion practitioners with low cost access to global markets
- The TFIA is encouraged to coordinate with industry to articulate anticipated skills shortages and play a greater role in assisting in the alignment of training with industry needs
- Peak fashion bodies must work to coordinate with RTOs and the TAFE sector to connect industry with organisations that can meet their training needs and identify graduate capabilities. Peak bodies can play a greater role in advocating the employment of local graduates in preference to overseas recruiting
- Peak fashion bodies must work to assist education providers identify opportunities within industry for limited work placements to provide students with on the job training and first-hand experience of key industry issues
- Professional associations and industry peak bodies must be encouraged to provide greater networking opportunities for graduates and alumni as a way of facilitating introductions to prospective employers and to stimulate interest in programs through industry connectedness
- The Fellow offers his services to the IBSA in formulating a comprehensive plan to identify workforce development needs in the area of fashion retail.

The International Specialised Skills Institute:

- ISS Institute may consider the establishment of a database of 'industry partners in need' to be shared amongst education providers that can be cross matched against student / graduate / alumni skills to ensure that skilled Victorians are made aware of employment opportunities.

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