

AUSTRALIAN FASHION'S NEW ERA

AS AFTERPAY MARKS THREE YEARS OF AUSTRALIAN FASHION WEEK SPONSORSHIP, INDUSTRY LEADERS REFLECT ON HOW THE FASHION SECTOR IS FARING.

ABOUT THIS REPORT

The fashion industry is built on constant evolution; from season to season, trend to trend, what's in style is always in flux. But the past three years have been particularly tumultuous for the Australian fashion sector.

Afterpay signed on as the title sponsor of Australian Fashion Week in 2020 at the height of the pandemic and, from the beginning, the goal has been to support designers – emerging and established – as they grapple with the extended impact of COVID-19.

As Afterpay celebrates its third year as title sponsor of Australian Fashion Week, this report seeks to assess the changes in the fashion industry since 2020, while also examining the ripple effects of Afterpay Australian Fashion Week on the Australian economy and charting the progress that has been made across sustainability, diversity and inclusion and accessibility.

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FOREWORD

A LETTER FROM THE AUSTRALIAN FASHION COUNCIL



The Australian fashion and textile industry is at a pivotal moment. We're facing inflationary pressures combined with shortages of skilled workers and materials, and outdated business models that need to transform to better support a thriving, resilient industry.

Australia has long overlooked the economic power of its fashion and textile sector. The AFC report which was supported by Afterpay, 'From High Fashion to High Vis', revealed that our industry contributes more than \$27.2 billion to the national economy and employs a workforce of over 489,000, 77 per cent of whom are women.

This reinforces our resolve to focus on four pillars underpinning the AFC's aim to guide the transformation of our industry to a socially, environmentally and economically prosperous circular economy by 2030:

1. Promote the Australian Fashion Trademark to grow domestic and global demand for design-led brands committed to responsible practice
2. Build the future local manufacturing capability of fibre and its derivatives, from yarn to textiles, fashion and uniforms, to close the supply chain loop and boost jobs and the economy

3. Develop skills and career pathways to address current and future skills needs, create jobs and increase the economic security for our industry's women-empowered workforce
4. Transition the sector to a circular economy by 2030 via the National Clothing Product Stewardship Scheme to create a just transformation towards Net Zero by 2050

Implementing these pillars will not only achieve a socially and environmentally responsible industry. But according to the AFC report 'Fashion Evolution: From Farm to Industry', which was supported by Afterpay, it could also grow our economic contribution to \$38 billion annually, providing security to over 7 per cent of Australia's female workforce.

I truly believe that, together, we can do what no single individual, organisation or even government can do alone.

My sincere thanks to all of you who continue to support our industry, with special thanks to Afterpay for making this report possible.

LEILA NAJA HIBRI
CEO, AUSTRALIAN FASHION COUNCIL

FASHION EMBRACED US. NOW IT'S OUR TURN.



It was at the height of the pandemic that Afterpay received the opportunity to partner with IMG on Australian Fashion Week.

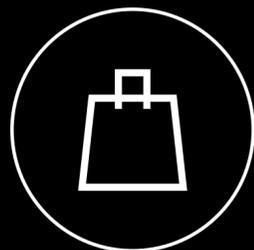
Our response was swift. The fashion industry was the first to embrace us, and we were determined to do all that we could to support an industry that gave us our first break.

At the time, the outlook for the Australian fashion industry was uncertain. In April 2020, a report from the Australian Fashion Council revealed that 43 per cent of brands weren't confident they could recover from the pandemic, while 23 per cent were certain they wouldn't.

We signed on as title sponsor in September 2020, and from the beginning we have been laser-focused on helping the industry rebuild and return stronger than before. We're proud of the role we've played in the past three years and the partnership we've established with IMG.

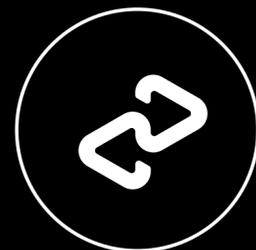
ANTHONY EISEN
AFTERPAY CO-FOUNDER

THE STATE OF FASHION 2023



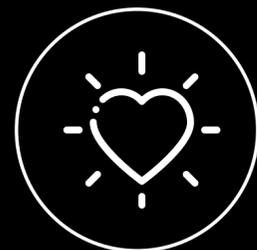
THE BUSINESS OF FASHION

Changing consumer behaviour, as well as new technology, is reshaping the fashion sector. A spending slowdown will test the industry's resilience.



THE AFTERPAY AUSTRALIAN FASHION WEEK EFFECT

Once a trade-only event, Afterpay Australian Fashion Week has become more accessible and more inclusive, amplifying its reach further than ever.



THE AUSTRALIA'S FASHION TRADEMARK

This new Australian Fashion Council initiative aims to bring Australian designers together to showcase the country's style to the world.



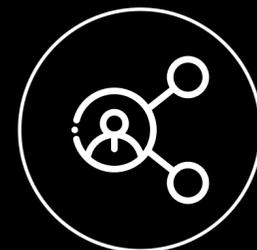
SUSTAINABILITY

Fashion brands, from start-ups to industry stalwarts, are feeling the heat to act sustainably. Incoming regulation will only add pressure.



RISE IN RECOMMERCE

Economic challenges along with a renewed focus on environmental impact has seen a surge in resale and rental.



THE POWER OF COLLABORATION

A series of strategic and creative partnerships is driving change across the Australian fashion landscape.



THE CHANGING WAY WE DRESS

The way we dress has evolved, and consumers are demanding more inclusivity from brands.

AUSTRALIAN FASHION IN FOCUS

What do Aussie shoppers want in 2023? And what are the biggest barriers to purchasing? Afterpay surveyed 1017 Australians to find out.

BY THE NUMBERS

GENDER



54.3%
female



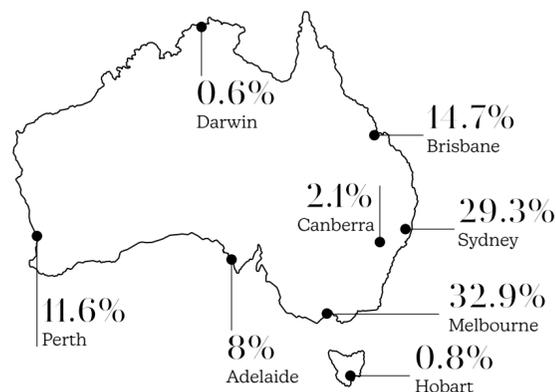
45.6%
male

0.1%
non-binary

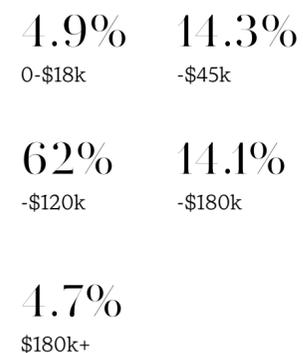
AGE



LOCATION



INCOME



WHAT SHOPPERS WANT

Australians are a nation of shoppers. Nearly half of Australians buy at least an item of clothing every month, with 8.8 per cent of shoppers buying 21-30 pieces a year, and 6.1 per cent purchasing more than 31 pieces.

The number one consideration for Australians when clothes shopping is price (83.3%).

However, 40.4 per cent say they value sustainability and 43.4 per cent look for garments that are made in Australia. Many (27%) say they feel social or peer pressure to buy sustainable clothing.

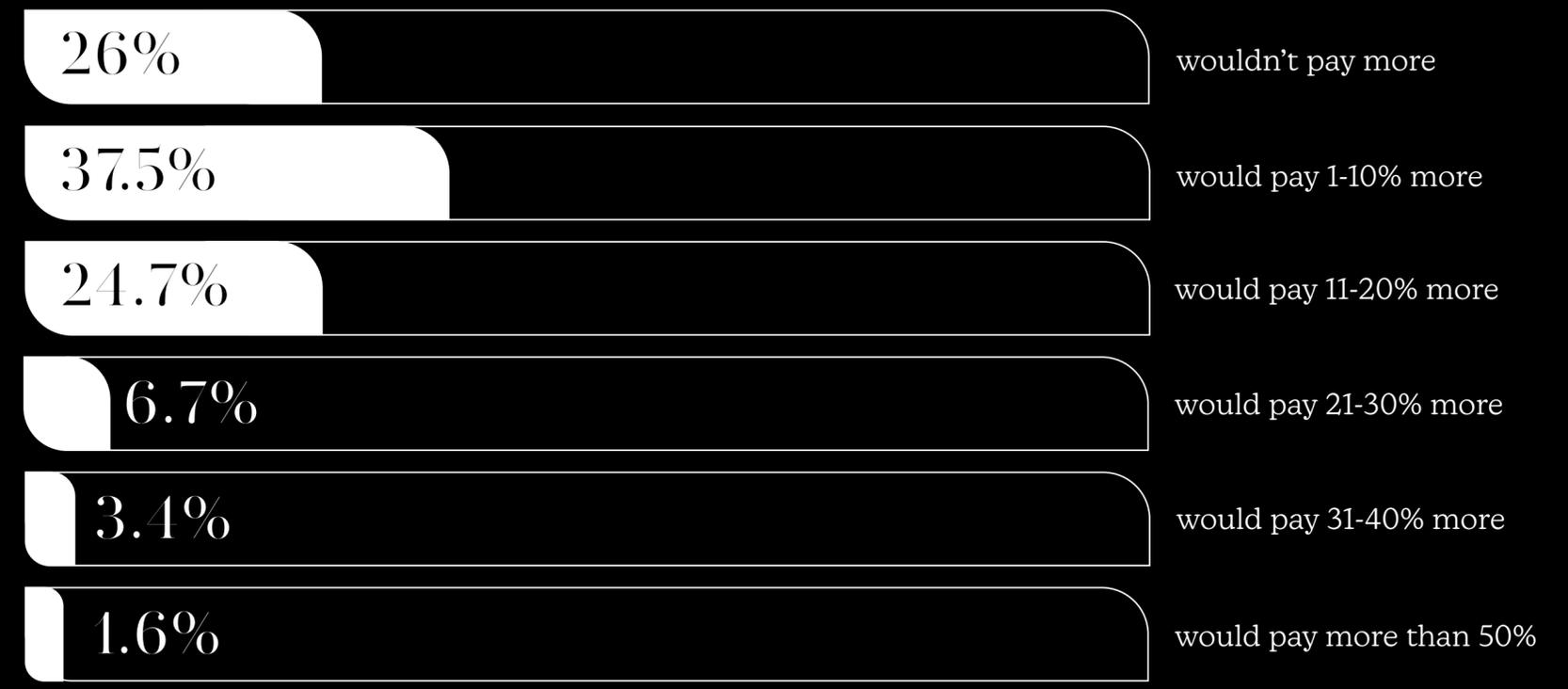
THE STRUGGLE TO SHOP SUSTAINABLY

While many consumers value ethically made fashion, many find it difficult to shop sustainably.

Six in 10 shoppers say that sustainable clothing is too expensive, while 47.1 per cent report it difficult to find sustainable brands. Some shoppers (40%) say there aren't enough Australian sustainable brands.

AUSSIES LOVE LOCAL FASHION

The vast majority of Australians (74%) are prepared to pay more for Australian-made fashion. However, the amount they will spend varies dramatically.





SHOPPERS' BIGGEST BARRIERS

Size does matter. Many (40.2%) Australians report that they struggle to find clothes in their size in some brands. Others (3.8%) say that their disability precludes them from purchasing garments they love, and 6.5 per cent are prevented from purchasing by a lack of gender-neutral options.

Another barrier? Two-thirds of consumers (67.8%) say that a lack of product or stock makes shopping a challenge.

FASHION'S GENDER-LESS FUTURE?

One in seven Australians are more likely to purchase from a brand that offers gender-fluid products, and one in four are "somewhat" more likely. More than a quarter of shoppers believe Australian brands don't offer enough in the way of gender-fluid fashion.

PEARLS ARE A BOY'S BEST FRIEND

A quarter of men (25.9%) say they are "likely" to buy clothes or accessories that aren't explicitly for men and 5.6 per cent say they would "very likely" do so. When asked about specific products, they responded:

50%

would wear rings

47%

would wear wristwear

33.2%

would wear bags

29.5%

would wear necklaces

18.1%

would wear earrings

9.9%

would wear nail polish

BORROWING FROM THE BOYS

More women than men say they are comfortable purchasing clothing and accessories that aren't gender specific, with 43.8 per cent saying they were likely to do so (compared to 25.9% of men), and 14.3 per cent saying they are very likely to do so (compared to 5.6%).

AUTHENTICITY OVER ASPIRATION

More than two-thirds of shoppers say they prefer authentic brand campaigns that showcase realistic beauty standards to marketing that is overly aspirational.

In fact, the majority of Australians want to see themselves reflected in fashion campaigns, with 29.9 per cent saying it is "very important" for campaigns to showcase Australian identity and feature local faces and landscapes and 53.8 per cent saying it is "somewhat important".

WHAT'S IN OUR WARDROBES

Two-thirds of Australians keep clothing for at least three years, on average. However, more than one in 10 wear clothes for less than a year.

Australians' wardrobes are filled with clothes they've never worn, with a quarter of us owning more than six unworn garments.

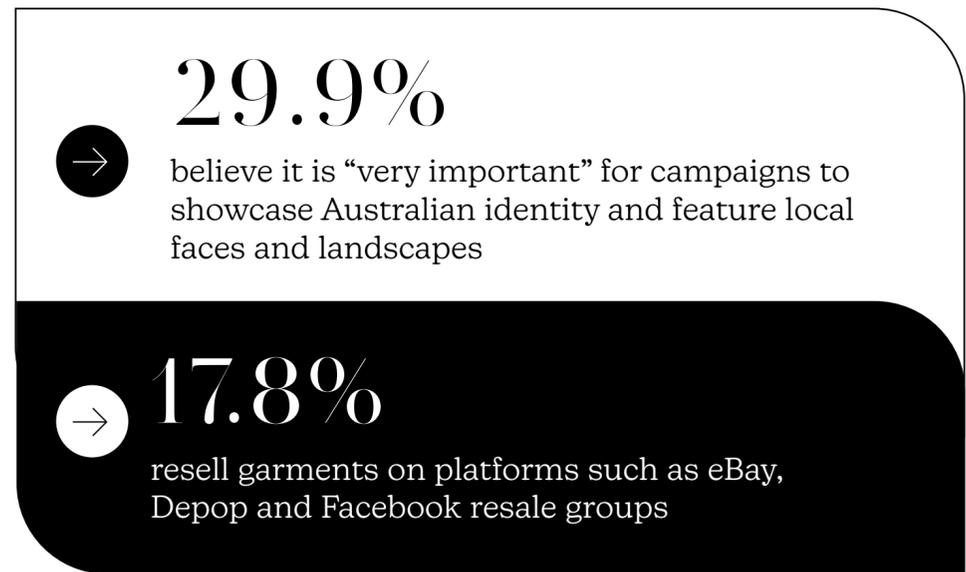
Forget spring cleaning. Around half of Australians only clear out their wardrobes every two to five years (although some Marie Kondo types clear the clutter every six months).

LETTING GO OF UNLOVED GARMENTS

The vast majority of Australians (70.4%) head straight to their local charity when they no longer wear an item of clothing.

However, a sizeable minority turn to recommerce, with 17.8 per cent reselling garments on platforms such as eBay, Depop and Facebook resale groups, and 2.5 per cent renting or leasing items to others.

Nearly one in 10 Australians bin the item altogether.





AUSTRALIAN FASHION WEEK FACTS

More than six in 10 Australians believe that Australia's fashion campaigns and runways are certainly or somewhat more inclusive than counterparts overseas.

While one in eight people say they are inspired by watching models on the runway at Afterpay Australian Fashion Week and one in five love seeing the designer collections, many are just as inspired by the street style during the event:

36.8%

are inspired by influencer looks on social media

24%

are inspired by Australian Fashion Week street style

BUSINESS OF FASHION

INSIDE THE FASHION INDUSTRY

HOW CHANGING CUSTOMER BEHAVIOUR AND NEW TECHNOLOGY IS RESHAPING THE FASHION SECTOR.

After a turbulent few years filled with store closures, supply chain issues and staffing shortages, a sense of normality is returning to the fashion industry. However, the pandemic has undoubtedly changed the business of fashion.

During lockdowns, e-commerce rates skyrocketed, accelerating the shift to online shopping. Three years later, the swing to e-commerce has slowed, but the boom in online shopping has left consumers with more sophisticated expectations around convenience and speed.

“THE SWING TO E-COMMERCE HAS SLOWED”

As Australians rediscover their love of in-store shopping, many brands are weighing up their channel mix. Some, including those who started out as direct-to-consumer brands, are turning their attention to brick-and-mortar stores, which offer the opportunity to connect with consumers and reinforce their brand DNA. Others are building out their omnichannel strategy. All brands are grappling with an explosion of sales avenues, from digital channels to domestic and international wholesale, physical stores, marketplaces and discount outlets.

Another shared challenge for fashion brands is the rising cost of customer acquisition, which is being fuelled by growing competition and climbing social media costs.

For some, the answer is a renewed focus on customer retention and a more sophisticated personalisation strategy.



Find out more from retailers and experts about the Australian business of fashion.



SPENDING SLOWDOWN WILL TEST FASHION RETAIL

In the current economic climate, customers will be more cautious about spending, writes the Australian Retailers Association CEO Paul Zahra.

Fashion retail in Australia has had a rollercoaster ride over the past few years. Despite the challenges brought about by the pandemic, the industry has shown resilience and adaptability to achieve strong results.

In January 2023, Australian Bureau of Statistics data revealed spending on clothing, footwear and accessories was up 17.5 per cent year-on-year – a remarkable result. The following month, in February, that growth softened to 6.2 per cent year-on-year. As the country's economy continues to experience headwinds, it will be a somewhat challenging period for fashion retailers.

“ SPENDING ON CLOTHING, FOOTWEAR AND ACCESSORIES WAS UP 17.5 PER CENT YEAR-ON-YEAR ”

These concerns are compounded by the industry's permanent state of disruption – with supply chain disturbances, cost-of-living pressures, an increased cost of doing business and changing consumer habits all adding additional pressure. Retailers who respond to the needs and demands of consumers will be best placed for success.

One trend becoming increasingly important in the fashion industry is circular economy initiatives. Consumers are ever more conscious of their environmental impact, and this is reflected in their purchasing decisions. Brands that align with their views and values on diversity, equity, and inclusion

(DEI) and sustainability are more likely to attract and retain customers. The origin of materials used in clothing production is also becoming more important to consumers. They want to know where their clothes come from and whether they were produced ethically and sustainably. Fashion retail is often seen as a barometer for discretionary spending. When people have more disposable income, they tend to spend more on fashion. Within the current economic climate, consumers are more cautious with their spending, and retailers need to be mindful of this.

Retailers with flexible return policies are also performing exceedingly well. The nature of the fashion industry means that clothes don't always fit perfectly, and customers appreciate the option to return items hassle-free. Brands that offer free and easy returns are more likely to build customer loyalty.

Whilst spending has held up to a reasonable degree in 2023, there is a lag effect with cost-of-living pressures, and retail fashion spending in Australia may soften in 2023. Businesses that best respond to emerging trends and changing habits will be best placed to navigate these challenging economic times.



PAUL ZAHRA
CEO, AUSTRALIAN RETAILER'S ASSOCIATION

CREATING COMMUNITIES AROUND FASHION BRANDS

Listening to customers and prioritising sustainability and local manufacturing are crucial, says Jac + Jack.

When Jac + Jack co-founder Jacqueline Hunt started out in the industry 20 years ago, brands still very much determined what was “in fashion” each season.

Today, the dynamic is different, says Hunt, whose team is engaged in continual cross-platform conversation with customers.

“The ecosystem has been flipped,” she says. “It’s no longer about the brand dictating what’s in fashion, as it used to be – it’s about the customer and the customer experience.

Now there’s a more reciprocal relationship.”

This new relationship has required a new *modus operandi*, which Hunt has embraced (“it feels more aligned with our values”). As well as analysing customers’ online behaviour, she and the team have built a full seasonal review into the brand’s design timeline. “We go through the whole collection and review what worked, what didn’t and ask, ‘What were customers really saying?’ ‘What were they telling us?’”

As an industry veteran, Hunt has seen plenty of change, and points to sustainability as a recent – and welcome – focus. Not only is Jac + Jack about to publish a 36-month road map to a more sustainable future, but the brand has virtually eliminated the use of synthetic fibres. The challenge now, she says, is to educate the public on the nuances of sustainability and then convey improvements to customers.

Another issue that Hunt views as critical? Support for local manufacturing. “We used to produce a lot more on-shore, and it’s been practically impossible for us to do,” she says. She points to the fact that all Jac + Jack’s jackets were once cut and sewed by a local supplier, but over the years, he and his machinists have gradually retired, leaving a huge skills gap.

In the past year, Jac + Jack has joined the ranks of brands that have earned the Australian Fashion™ certification, and Hunt welcomes the Trademark’s brand values like raw, fearless, and effortless.

“Effortlessness is very much part of our DNA,” says Hunt, adding that it’s an equally apt description of Australian style. “Just as Italy is tailored and France is ‘dressed’, we are all about being effortless.”

She believes the trademark presents a unique opportunity for Australian designers to work together. “We will only succeed when we all partner with each other and stand together as an industry.”

DESIGNER SPOTLIGHT

“Australia is emerging as a shining example of the fashion industry doing right in a post-pandemic world. Australian fashion businesses are rapidly combining sustainability with creativity and desirable lifestyle positioning. All the key ingredients are there for the industry to thrive – and we know that both locally and abroad there is extremely strong consumer goodwill towards Australian brands. But more needs to be done to create awareness to really increase demand.”



BILLY VOSS,
CEO, BASSIKE

GEN Z AND THE AGE OF OPTIMISM

BLOCK'S ECONOMIST FELIPE CHACÓN WEIGHS IN ON THE RISE OF GEN Z AND WHAT IT MEANS FOR RETAILERS.

"Gen Z is on the cusp of becoming a major player in the global economy and will be taking bigger and bigger bites out of the vast market share of consumer spending enjoyed by millennials.

This cohort has seen their parents forced to navigate multiple significant economic crises, and the oldest among them have started their careers during a commerce-upending global pandemic.

Despite all this, across many metrics, we continue to see a near-linear relationship between age and optimism about the future, with younger generations being more upbeat across the board.

Adults who have only recently aged into the labour force are disproportionately lower income as they are just getting started in their careers. But they also have more of an appetite for risk and their prime earning years are ahead of them. This means that Gen Z feels more confident about the future than people in older cohorts, and this optimism translates into less concern about inflationary pressures and more bullishness about their own future spending. With indicators like consumer sentiment and inflation, expectations are half the battle."

"Gen Z wields its power like no other audience. I think by virtue of having grown up in the direct-to-consumer heyday (and due to other forces outside fashion and retail), Gen Z feel free to speak their minds and vote with their wallets in a way we don't see other customers behaving.

They tell brands what they think. They give feedback, solicited or not. They don't believe in a top-down approach to fashion. Obviously not every brand will respond in kind – Chanel is not going to ask its audience whether it wants a blue or red tweed skirt – but for many fashion businesses, listening to Gen Z and harnessing its spending power will be make-or-break."



LAUREN SAMS, FASHION EDITOR,
AUSTRALIAN FINANCIAL REVIEW

THE AFTERPAY AUSTRALIAN FASHION WEEK EFFECT

AUSTRALIAN FASHION WEEK'S NEW AGE

Today, the audience – and influencers – have become part of the show, as this agenda-setting event increases its reach and inclusivity.

Australian Fashion Week has always been a critical date on the fashion calendar. For established designers, it's an opportunity to build excitement around their collections; for emerging brands, it's a potential springboard to success, and a tried-and-tested way to catch international buyers' attention.

Since launching in 1996, Australian Fashion Week has changed enormously. Locations and sponsors have altered, and the line-up of designers has, too. Unlike European fashion weeks – long dominated by storied, historic fashion houses – Australian Fashion Week is sustained by a steady stream of younger brands.

And it's not just the event itself that has evolved; the audience for Fashion Week has changed, too, with the public able to purchase tickets to shows for the first time in 2021. The rise of social media has also opened up Fashion Week and amplified its reach, and today influencers are as likely to sit front row as magazine editors.

In many ways, these influencers have become part of the show at Fashion Week, with Afterpay's survey revealing that while one in five Australians love seeing the collections, 36.8 per cent are inspired by influencers' looks on social media and 24 per cent enjoy the street style. Brands have recognised this and are investing in influencers and street style photography accordingly.



Discover more insights into Afterpay Australian Fashion Week and its evolution.

DESIGNER SPOTLIGHT

“I love the theatre of a show. I love it. It's one thing designing a collection for commercial outcomes, but it's another thing designing for the pure experimentation of it – the joy of it. We're looking forward to celebrating the work we've done so far and showing the brand in a new way.”



LESLEIGH JERMANUS,
CO-FOUNDER/CREATIVE DIRECTOR,
ALEMAIS

HOW FASHION WEEK HAS EVOLVED

SINCE AFTERPAY'S SPONSORSHIP OF AUSTRALIAN FASHION WEEK, THE EVENT HAS SEEN A RAFT OF CHANGES.

When Afterpay took over title sponsorship of Australian Fashion Week, the fashion industry was in a perilous state. It was 2020 and the height of the pandemic, and The Australian Fashion Council had just released a survey revealing that many fashion brands were fearful for the future.

Facing supply chain issues and store closures, 43 per cent of brands weren't confident they could recover from the pandemic, while 23 per cent were certain they wouldn't. That year, Australian Fashion Week had been cancelled due to COVID-19 restrictions.

Afterpay Australian Fashion Week's first step was to waive participation fees for all designers showing at Afterpay Australian Fashion Week 2021. The event was also made accessible to consumers for the first time, and in the past three years, Afterpay Australian Fashion Week has delivered 15 consumer shows and featured 100 designers in multi-brand shows.

The past three years has also seen a number of other 'firsts' aimed at elevating accessibility, inclusivity, sustainability and diversity. These include Australian Fashion Week's first all-Indigenous show, featuring First Nations designers, models and back-of-house staff and the launch of the 'Afterpay's Inclusive by Design' program, aimed at improving the inclusivity of Australian runways.

Behind the scenes, four designers with disabilities were invited to show their collections at a closed-door event to a panel of industry experts, and as a result, sustainable

and inclusive designer Kimbralou showed her collection alongside 13 other Australian brands.

Afterpay has also launched The Edit Collection, in collaboration with the AFC and Vicinity shopping centres, where designers, including Bondi Born, ESSE Studios and more, have been offered a technology-enabled, physical store in which to show their collections.

Afterpay has also helped the AFC launch two reports that demonstrate the economic impact of the fashion industry in Australia and contributed almost \$1 million to Thread Together, which helps reduce fashion waste by partnering with brands and the charitable sector.



THE ECONOMIC IMPACT OF AUSTRALIAN FASHION WEEK

For Australian designers, fashion week is a springboard to international markets, writes Natalie Xenita, the Vice President-Managing Director of IMG Fashion Events and Properties Asia-Pacific.

Since its launch in 1996, Australian Fashion Week (AFW), owned and operated by IMG, has created valuable business and export opportunities for Australia's fashion industry. Every year, it draws buyers and retailers, press, key opinion leaders, industry, talent, consumers and crew from around the globe. As Asia Pacific's leading international fashion trade event, AFW attracts more

than 24,000 attendees and participants across the five-day schedule.

AFW provides a springboard for designers to the international market. Zimmermann, Dion Lee, CAMILLA AND MARC, Aje, Bec + Bridge, Alex Perry and Camilla have all launched their brands at AFW and gone on to experience significant international growth.

Historically, one of the biggest challenges facing Australian designers has been geographic isolation and the prohibitive costs associated with profile-raising trips to the lucrative European and US markets. However, if brands want to effectively scale up, they need to connect with international audiences, including both buyers and customers.

“ IF BRANDS WANT TO EFFECTIVELY SCALE UP, THEY NEED TO CONNECT WITH INTERNATIONAL AUDIENCES ”

As the keystone for growth and recognition, AFW gives established and emerging Australian designers the opportunity to showcase their creativity and forge new pathways in international markets.

The AFW schedule is carefully curated to achieve a balance of established and emerging brands, with AFW's Next Gen program uncovering new talent since 1996. It is also important for established brands to participate on the schedule, as they attract the attention

of major international buyers and media, which delivers opportunities for emerging brands to be discovered and build a pipeline of Australia's next generation of fashion export.

IMG's unparalleled international reach, as the owner and operator of both AFW and New York Fashion Week: The Shows, has propelled countless Australian designers onto the international stage. We've seen many designers who have debuted and utilised the platform of AFW to go on and show at NYFW and beyond, including Zimmerman, Aje, Dion Lee, Rebecca Vallance and more.

IMG's Fashion Week streaming platform, AAFW.com.au, provides a global tool for Australian fashion and design to be seen by consumers and fashion fans from across the world. Last year, people across 71 countries viewed the shows at AAFW in Sydney via the streaming platform.

This year's event will see one of the most diverse AAFW schedules yet – with more than 70 participating designers, including 12 First Nations designers and 21 BIPOC designers. Today, AAFW has undeniably become a cultural moment with influence, capturing the attention of industry leaders, fashion fans and beyond.



NATALIE XENITA
VICE PRESIDENT-MANAGING DIRECTOR, IMG
FASHION EVENTS AND PROPERTIES ASIA-PACIFIC

FASHION WEEK FIRST FOR CUE

THE FASHION STALWART ON WHY
IT'S FINALLY SHOWING AT AFTERPAY
AUSTRALIAN FASHION WEEK.

Cue may be one of Australia's oldest and most successful womenswear brands, but until this year, it has never presented its own show at Australian Fashion Week.

"When Fashion Week first started in Australia, it was really geared towards brands that wholesale," says Cue brand manager Kate Bielenberg. "But as Afterpay came on board as the sponsor, and opened up consumer shows, it felt like the right time for us." Cue will show on day four of Afterpay Australian Fashion Week, and Bielenberg sees it as a chance to introduce the brand to a new generation of customers. "I think it's also exciting for us to show the Australian consumer that we're more than just workwear."

Last year, the brand took part in a group show at Australian Fashion Week, and saw "great sell-through" on the styles they showed. The event was also an incredible motivator for Cue's loyal team, says Bielenberg. "We have such a love of fashion, which drives everything that we do. Everyone working for the brand is invested in the fashionability of the brand - and there is nothing better than seeing your product on a runway.

"It was such a buzz for everyone from our sample machinists to our pattern makers. Everyone's mums watched [on livestream]. So, it was wonderful for the team - just magic - a lovely energy builder for the brand, internally as well as externally."

DESIGNER SPOTLIGHT

"Our first Australian Fashion Week show in 2019 was a real pinch-me moment. It was amazing. We had so much positive feedback. We had the Net-A-Porter buyer and the Moda Operandi buyer and Saks buyer, and the next day they placed their orders."



DALE MCCARTHY,
BONDI BORN

THE AUSTRALIAN FASHION TRADEMARK

Effortless, Raw, Boundless and Fearless

TAKING AUSTRALIAN FASHION TO THE WORLD

HOW THE AUSTRALIAN FASHION TRADEMARK IS CELEBRATING LOCAL DESIGNERS, AND BRINGING SUSTAINABLE VALUES TO THE FORE.

Effortless, Raw, Boundless and Fearless. These are some of the values that embody Australian fashion, and which now represent the new Australian Fashion Trademark.

Launched in 2022 by the Australian Fashion Council, the Trademark aims to sell Australia's unique vision, original design and progressive values to the world. As an instantly recognisable symbol, it will drive demand by helping customers discover, explore and buy Australian fashion.

The Trademark was launched with a campaign that positions Australia as Down Under but "out in front", and, so far, more than 30 brands have been certified.



A MARK OF AUTHENTICITY

To be certified with the Australian Fashion Trademark, brands must meet the highest standards of authentic, creative and high-quality design.

They must also demonstrate a commitment to transparent and social practices. By encouraging brands to address sustainability challenges collectively and openly, the Australian Fashion Trademark aims to guide designers and fashion businesses to prioritise progress over perfection.

The Australian Fashion Trademark criteria references the United Nations Sustainable Development Goals (UN SDGs), which encourage brands to connect their environmental and social impact goals to the international framework.



Effortless,
Raw,
BOUNDLESS
and
Fearless

Explore Australian Fashion certified brands at australianfashion.org

- | | |
|-------------------------|------------------|
| Aje | Jac + Jack |
| Alix Higgins | KITX |
| Anna Antal | Kloke |
| bassike | Liandra Swim |
| Bianca Spender | MAARA Collective |
| Bondi Born | Macgraw |
| Camilla | MANNING CARTELL |
| Carl Kapp | Matteau |
| Commas | Michael Lo Sordo |
| Cue | MNDATORY |
| Dinosaur Designs | NGALI |
| ESSE | Nobody Denim |
| Ginger & Smart | Romance Was Born |
| Helen Kaminski | State of Escape |
| Holly Ryan | The Upside |
| Ihraa Swim | Viktoria & Woods |
| Iordanes Spyridon Gogos | |

WE MUST SHINE A LIGHT ON AUSTRALIAN FASHION

Why Cue believes that collaboration is the answer to global competition.

A lot has changed since Cue opened its first store in Sydney's Strand Arcade in 1968. Back then, miniskirts were in vogue, women made up just 31 per cent of the workforce and the Australian fashion industry was still isolated from the rest of the world.

"You could only buy what you could see in store," says Cue brand manager Kate Bielenberg. "Online has really

opened up the world. We've seen the rise of fast fashion and all the luxury brands are available here now, too. Today, competition is fierce," she says.

That's one of the reasons Cue believes that The Australian Fashion Trademark is so vital. "It would be wonderful if the trademark could position Australian fashion globally in the way that Tourism Australia really shines a light on the beauty of our country," says Bielenberg.

Bielenberg says the Trademark acknowledges the company's dedication to high-quality design, sustainability and local production. "More than 50 per cent of our range is made here, and local manufacturing has actually been part of our secret to success," she says, explaining that the capacity to produce locally has enabled Cue to produce limited test runs quickly.

PERCEPTIONS OF AUSTRALIAN FASHION ARE EVOLVING

Initiatives like the Australian Fashion Trademark are vital says designer Michael Lo Sordo.

A decade after launching his eponymous brand, designer Michael Lo Sordo hasn't strayed far from his signature, elevated style. "I've always believed in the DNA and vision I put forward, and I haven't steered away from this. I believe in sticking to what we do best and listening to our customers."

As well as marking a decade in business, Lo Sordo is also proud of being certified under the Australian Fashion™, whose brand pillars "raw, fearless, boundless, effortless" resonate with every aspect of his brand, from design to execution. He believes that perceptions of Australian fashion are slowly evolving, and as more international consumers come to appreciate Australia's approach to style, the Australian Fashion Trademark will become increasingly important.

"The Australian Fashion Trademark stands for quality, style and brand recognition."



BIANCA SPENDER,
OWNER & DESIGNER,
BIANCA SPENDER

DESIGNER SPOTLIGHT

"Having a Trademark for Australian design is an exciting and highly anticipated moment. When I worked overseas, I was always asked what Australian design is. It has been exciting to see the change where people are now coming to me to say they love Australian design. We have gained an international presence and following, and having a symbol to represent this, and one refined message is powerful for our position on the international stage."

SUSTAINABILITY



FASHIONING AN ECO-FRIENDLY FUTURE

What consumers really think about sustainability – and the creative ways brands are closing the loop.



In 2023, more conversations about sustainability are occurring across the fashion spectrum, from major global brands to up-and-coming labels, and these discussions are growing more sophisticated – particularly as regulators turn their attention to fashion waste. Some brands are focused on traceability and sourcing environmentally friendly fabrics; others are committed to local manufacturing or have launched take-back or repair programs.

Consumers, too, are becoming increasingly conscious of the ethical and environmental implications of the clothes hanging in their wardrobes, with Afterpay’s survey revealing that one in four Australians feels social pressure to buy sustainably.

However, there is a two-track mentality to sustainability: some consumers value shopping sustainably (40.4%) or locally (43.4%). Others are less interested, with many (60%) citing cost as a barrier. Even among those prepared to pay more for locally made clothing, only 62 per cent would pay up to 20 per cent more.

The fashion industry is one of the world’s largest polluters, but sustainability is a complex topic, and one that encompasses everything from supply chains to technology, labour policies to fabrications. This year will likely see increased pressure from regulators, and the Australian Fashion Council has led a consortium to design a National Clothing Product Stewardship Scheme.



Find out more about the program, and other developments in sustainable fashion in this section.

6 in 10

shoppers believe sustainable clothing is too expensive

47.1%

find it difficult to find sustainable brands

40%

say there aren’t enough sustainable Australian brands

74%

are prepared to pay more for Australian-made clothes (26% wouldn’t pay more)

OF THE 74%:

37.5%

would pay 1-10 per cent more

24.7%

would pay 11-20 per cent more

6.7%

would pay 21-30 per cent more

3.4%

would pay 31-40 per cent more

1.6%

would pay more than 50 per cent more

CLOSING THE LOOP ON AUSTRALIAN FASHION

MEET THE NEW NATIONAL SCHEME TO REDUCE FASHION WASTE.

Australians love fashion; every year, we buy 56 items of clothing each, on average. And yet the vast majority of garments are made from non-sustainable, non-durable materials, which means that when it comes time to clean out wardrobes and dispose of unwanted pieces, consumers have few options.

Australia doesn't offer a national approach to collecting or recycling unwanted clothing, and, as a result, the reuse and resale sector is becoming overwhelmed by donations that are unwearable. Shockingly, fashion has become one of Australia's largest contributors to waste, and every year, more than 200,000 tonnes of clothing (including socks and underwear) and textiles end up in landfill.

THE PATHWAY TO CHANGE

No single organisation can address these challenges alone, so the Australian Fashion Council has led a consortium with members from Charitable Recycling Australia, Queensland University of Technology, Sustainable Resource Use and WRAP to devise a world-class initiative to improve the design, recovery, reuse and recycling of clothing, providing a roadmap to clothing circularity in Australia by 2030.

The National Clothing Product Stewardship Scheme, which provides a roadmap to achieving Net Zero by 2050, will be formally launched by the Hon. Tanya Plibersek MP, Minister for the Environment and Water, in June 2023.

The scheme and roadmap aim to guide the Australian fashion industry towards circularity by transforming outdated business models, driving innovation, changing citizen behaviour and recycling clothing in high-value applications.

 Find out more on the Australian Fashion Council's [website](#).

19.9%*

of Australians only clear out their wardrobes every five years

15.7%

Australians have 6-10 items in their wardrobe that they've never worn

11.1%

Australians have more than 11 items in their wardrobe they've never worn

* Australian Fashion In Focus survey by Afterpay, 2023.

MOVING THE NEEDLE ON SUSTAINABLE FASHION

From seaweed-fed sheep to shredding off-cuts, the industry is taking a creative approach to circularity.

When KITX founder Kit Willow launched a range of ethical, made-to-order t-shirts with Citizen Wolf earlier this year, it was the latest in a long line of sustainable innovations spearheaded by the designer.

One of Australia's sustainable fashion pioneers, Willow creates clothing using natural, organic and recycled materials, and is as concerned about the end of her garments' lives – and more specifically, ensuring that they don't end up in landfill – as she is about their creative inception. As well as creating clothing that is designed to last, Willow recently introduced a scheme to collect and repair preloved KITX clothing to be resold online.

“The status quo of the fashion system is broken with too many natural resources being consumed to create an oversupply of fashion that gets discarded,” says Willow.

Dr Lisa Lake, the director of the Centre of Excellence in Sustainable Fashion and Textiles, says that, like KITX, more and more brands are finding ways to reduce their environmental impact. “It's really exciting to see more innovation taking place. There's a lot to be positive about.”



She points to menswear brand MJ Bale, which produces knitwear using carbon-positive wool. This is thanks to a partnership with Kingston farm in Tasmania, which adds seaweed to sheep's feed to reduce methane emissions.

Cue is another Australian brand working to improve its environmental impact, by using Good Earth Cotton, which employs technology that means it is completely traceable from the cotton mill to the finished products. Dr Lake believes that emerging technology like this will play a key role in solving sustainability challenges. "There is so much research and development going into creating bio-based materials," she says.

“THERE IS SO MUCH RESEARCH AND DEVELOPMENT GOING INTO CREATING BIO-BASED MATERIALS”

Some technological advancements will help designers cut costs and improve environmental outcomes, she says, pointing to 3D digital sample programs, which eliminate the need for fabric samples, and wholegarment seam-free knitwear machines "which are almost like a 3D printer for knitwear" and produce garments without any excess fabric.

"Imagine having a factory filled with these machines to create knitwear on site in Australia, using wool and cotton we already produce."

Dr Lake acknowledges that many designers are constrained by tight margins and constant deadlines, making the adoption of such technology difficult. However, she says that international pressure may force brands' hands. "There are new regulations coming in from overseas that will impact Australian businesses and relate to traceability and sustainability," she says, pointing to the Uyghur Forced Labor Prevention Act, which enables the US government to stop and seize products from brands that are produced in China and unable to prove that their supply chain is free of modern slavery.

Dr Lake believes that collaboration is the answer. "I'd love to generate a research culture that's a really welcoming, inviting space for brands to share their firsthand knowledge with researchers."

Courtney Holm, the founder of Melbourne ethical fashion brand A.BCH, agrees. She has recently secured funding to create a platform where brands can buy and sell deadstock, and is keen to send A.BCH's offcuts to Turkey to be shredded down into recycled feedstock. However, she says the plan would make more economical and environmental sense if other Australian brands got on board. "We don't have enough offcuts. But if we partner up with other people in the industry, and get their offcuts too, we could do something bigger and maybe even bring the machinery to Australia."

"We can't do circularity alone. It's not effective unless everyone is doing it and participating."

DESIGNER SPOTLIGHT

"Nobody Denim is passionate about using locally sourced raw materials where possible and committed to upskilling the local workforce to ensure as much manufacturing as possible is able to be kept on shore. While this model of production is increasingly cost and labour restrictive, in committing to both these things, Nobody Denim drastically reduces the carbon footprint of each garment."



JOHN CONDILIS,
CO-FOUNDER, NOBODY DENIM

RISE IN RECOMMERCE

Recommerce is becoming an increasingly powerful force in Australian fashion, thanks to heightened environmental concerns among consumers, an accessible price point and the allure of scarcity, as well as increasingly sophisticated technology.

Today, nearly one in five Australians resells garments on platforms such as eBay, Depop or Facebook groups, according to Afterpay's research, with 8.3 per cent of consumers taking a product's resale value into consideration when they buy new clothes.

In 2023, Australian fashion brands are taking a variety of approaches to recommerce, which encompasses rental and resale. Some are launching their own take-back or recycling schemes; others are renting garments, while still others are happy to keep recommerce at arms-length, allowing third-parties, including local and global online platforms, to recirculate their products.



70.4%

of Australians take garments to secondhand shops when they no longer want them

17.8%

resell them on platforms such as eBay, Depop or Facebook resale groups

2.5%

rent or lease the item to others

8.3%

consider a product's resale value before purchasing

67.3%

have bought or sold secondhand clothing

RECOMMERCE IS DISRUPTING THE FASHION INDUSTRY

eBay's head of fashion Brooke Eichhorn writes that a significant opportunity awaits fashion brands who wish to tap into a new market via resale.

As the world becomes increasingly aware of the environmental and social impacts of fashion production, the next wave of fashion consumption has arrived. Resale and rental platforms are disrupting what it means to buy, sell and love fashion.

Today, fashion lovers want to make a statement with their clothing choices, not just with their style but also their impact on the environment. Ninety per cent of eBay buyers globally purchased pre-loved goods in the last year. eBay has long been a champion of pre-loved fashion, offering a low barrier for anyone to sell their collections to a vast audience. In Australia this translates to hundreds of thousands of people buying and selling pre-loved fashion on ebay.com.au.

Unlocking the economic benefits of resale democratises fashion, giving everyone access to designer labels, sold-out items and hard-to-find pieces. Nearly two-thirds of Gen Z buyers cited financial savings as a reason for participating in recommerce.

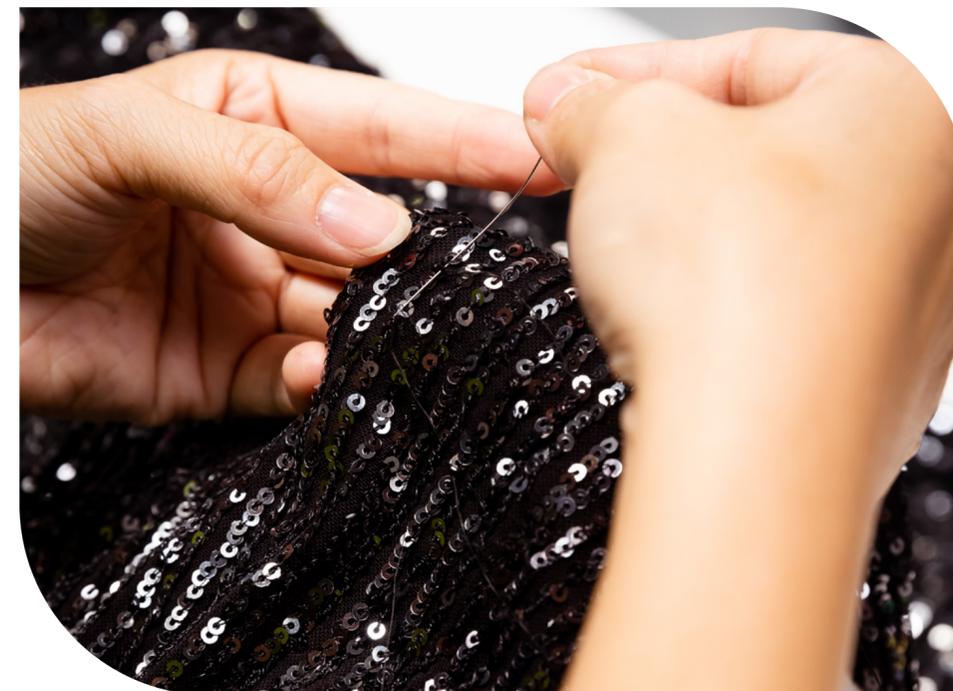
Australia is a fashion-forward nation with Aje and Zimmermann amongst the top 10 searched keywords on eBay.com.au in February this year. We've seen a rise in savvy entrepreneurs tapping into this demand and turning their passion into a lucrative income source.

The way fashion is being created and consumed can change for the better. For fashion brands, this represents a significant opportunity to tap into a new market, reach new customers and unlock the value of their garments as ownership passes.

In previous years we've seen 16 million pre-loved fashion items listed for sale on eBay.com.au.* eBay is committed to improving resale technology and making circularity part of the fashion industry's future.



BROOKE EICHHORN
HEAD OF FASHION, EBAY



20%

of eBay buyers, globally, cite the circular economy as the top reason for buying pre-owned

34%

of eBay sellers around the world say that sustainability is a major reason for engaging in recommerce

64%

of sellers say that selling second-hand products has become easier in the past year

79%

of sellers say that their selling on eBay has remained the same or increased over the past six months

*eBay internal data, listings 2020-2022

CASE STUDY

FROM RENTAL TO RESALE: GLAMCORNER ON EBAY

How the fashion rental platform extends the life of its garments further with eBay.



When it comes to recommerce, GlamCorner is one of Australia's fashion leaders. Launched in 2012, the online platform for rental and pre-loved clothing was born out of co-founder and COO Audrey Khaing-Jones' frustration of having a wardrobe full of clothes and nothing to wear.

Since then, GlamCorner has helped accelerate the transition towards a more sustainable and circular future for Australian fashion. Every day, the brand collects, processes, cleans, repairs and recirculates more than 5000 pieces of clothing. "This accounts for around 50-60 tonnes of clothing redirected back into circulation."

Then, once a garment has been rented 15-20 times on average on GlamCorner, it is often sold as a pre-loved item on eBay - extending the life of the item even further.

Khaing-Jones says that the success of GlamCorner's eBay store is thanks to rising awareness of the environmental impact of the fashion industry, as well as growing dissatisfaction with fast fashion. Recommerce, whether rental or resale, also allows customers to access designer fashion, she adds.

“ RECOMMERCE PROVIDES DESIGNER-QUALITY BRANDS AT A VERY ATTRACTIVE PRICE POINT. WE LOOK FORWARD TO CONTINUING THIS JOURNEY AS CONSUMERS INCREASINGLY LOOK FOR SUSTAINABLE FASHION OPTIONS. ”



THE POWER OF COLLABORATION



WHY PARTNERSHIP MATTERS

Some of Australian Fashion's leading lights are driving change and making a difference through collaborations, partnerships and mentoring.

The fashion industry has always been fuelled by creative collaboration, whether that's the shared vision of a designer and their team, the dynamic oscillation between photographer and model, or a magical partnership between artists.

Right now, there are a number of influential and strategic collaborations driving change across the Australian fashion industry. Retailers like David Jones and THE ICONIC have launched programs aimed at sharing knowledge with Indigenous designers in order to support the First Nations fashion sector. Meanwhile, Thread Together is connecting the fashion industry and charitable sector at an unprecedented scale to help address fashion waste and social deprivation.

And then there's the Australian Fashion Trademark, which has ushered in a new kind of collaboration between local designers. At a time when consumers globally are looking for sustainability and authentic storytelling in the brands they buy, the certification brings designers together to showcase Australian style to the world, proving that, in many cases, strength does lie in unity.



Here are several collaborations refashioning the industry...



AN ICONIC PARTNERSHIP

One of our biggest online retailers teams up with a First Nations fashion hothouse for a groundbreaking mentoring program.

When the First Nations Fashion + Design Show was held at Afterpay Australian Fashion Week in 2021, it not only received a standing ovation, it made history.

The event was a collection of remarkable “firsts”: the first show dedicated to Aboriginal and Torres Strait Islander designers; the first all-Indigenous cast of models; the first back-of-house staff led by a First Nations team.

“THE JOURNEY SO FAR HAS BEEN INCREDIBLE FOR BOTH OUR TEAMS AND ALL THE COLLABORATORS INVOLVED”

But while the reaction to the show was enthusiastic, its success exposed a new challenge for the not-for-profit First Nations Fashion and Design (FNFD) organisation. “Where we fell short is that our designers weren’t ready to go to market,” says FNFD Founder and Chair Grace Lillian Lee, explaining that while First Nations designers bring a unique richness and beauty to the industry, many would like more commercial experience to help translate their creative and cultural talents into a viable business.

Enter online retailer THE ICONIC, which came on board to support FNFD’s 2022 show, and last year launched

THE ICONIC x FNFD Incubator Program.

A long-term, co-designed initiative, the program offers an annual cohort of First Nations designers inclusive real-world learning opportunities through tours, e-learning and one-on-one meet-ups with mentors.

The pilot program is already underway and has paired three labels – Elverina Johnson (Pink Fish), Briana Enoch (Jarawee) and sisters Glenda, Juanita, Dale and Cheryl McCulloch (Myrrdah) – with industry mentors Pip Edwards (P.E Nation), Johnny Schembri (By Johnny) and Laura Liles and Tristan Liles (Kinga Csilla)”, as well as cultural mentors, Shonae Hobson (National Gallery of Victoria), Julie Shaw (founder and director Maara Collective) and Yatu Widders- Hunt (founder of Australian Indigenous Fashion).

“We are very proud of the program,” says Gayle Burchell, THE ICONIC’s Chief Commercial and Sustainability Officer. “We have already learnt so much from our partners at FNFD and are excited to put this into action to better facilitate the economic empowerment and viability of the First Nations fashion industry.

“While the Incubator Program is only at its beginning stages, its inception and the journey so far has been incredible for both our teams and all the collaborators involved.”

CASE STUDY

THREAD TOGETHER: A FASHION MODEL FOR THE FUTURE

How Thread Together matches unsold stock with those most in need restoring dignity and hope.

Andie Halas was taking a consignment of new towels to a charity back in 2012 when she experienced a lightbulb moment. As a then-executive at family-owned swimwear brand Seafolly, she knew plenty of Australian brands had huge amounts of surplus stock, much of which ended up in landfill. Why couldn't these clothes, shoes and accessories – all in perfect condition – be donated to Australians in need?

A decade later, Halas' not-for-profit Thread Together partners with more than 1000 fashion brands and retailers to deliver 5.5 million units of surplus stock to vulnerable Australians, including women escaping family violence, homeless adults and children, and those who've just arrived in Australia seeking refuge.

In 2022 alone, the charity worked with 8000 volunteers and distributed 1.2 million units of clothing to an average 2000 people each week.

“Since that lightbulb moment, we've done a lot,” Halas says.

With volunteer support from corporates including Afterpay, Salesforce and Commonwealth Bank, Thread Together distribute clothing to social support agencies through:

- online requests from case workers
- vehicles with walk-in wardrobes that can meet emergency needs in natural disasters, such as the recent floods in New South Wales and across the country
- clothing hubs (think retail stores without a POS counter) that offer an authentic shopping experience for people in need
- a wardrobe and capsule service to close the gap for immediacy of need of clothing for women and children escaping domestic and family violence. Launched in November last year and installed in 40 crisis accommodation centres so far with a total of 100 planned for this year. .

While the organisation has scaled to an impressive size, Halas remains profoundly moved by the stories of the individuals receiving help, including an eight-year-old refugee she met on her first visit to Sydney's Asylum Seekers Centre.

“She was so small and, instead of being at school, she was in a support centre,” says Halas, who teared up as the little girl chose some new shoes, a cardigan and a dress.





“ONE OF THE MOST NOTABLE SHIFTS HAS BEEN TOWARDS SUSTAINABILITY AND ETHICAL PRODUCTION”

For the diverse mix of brands and retailers who donate stock, Thread Together offers a global first, closed-loop solution to the knotty issue of pre-consumer textile waste. Keeping clothing in circulation for the longest possible time is the most effective form of reuse, according to the Australian textile waste hierarchy.

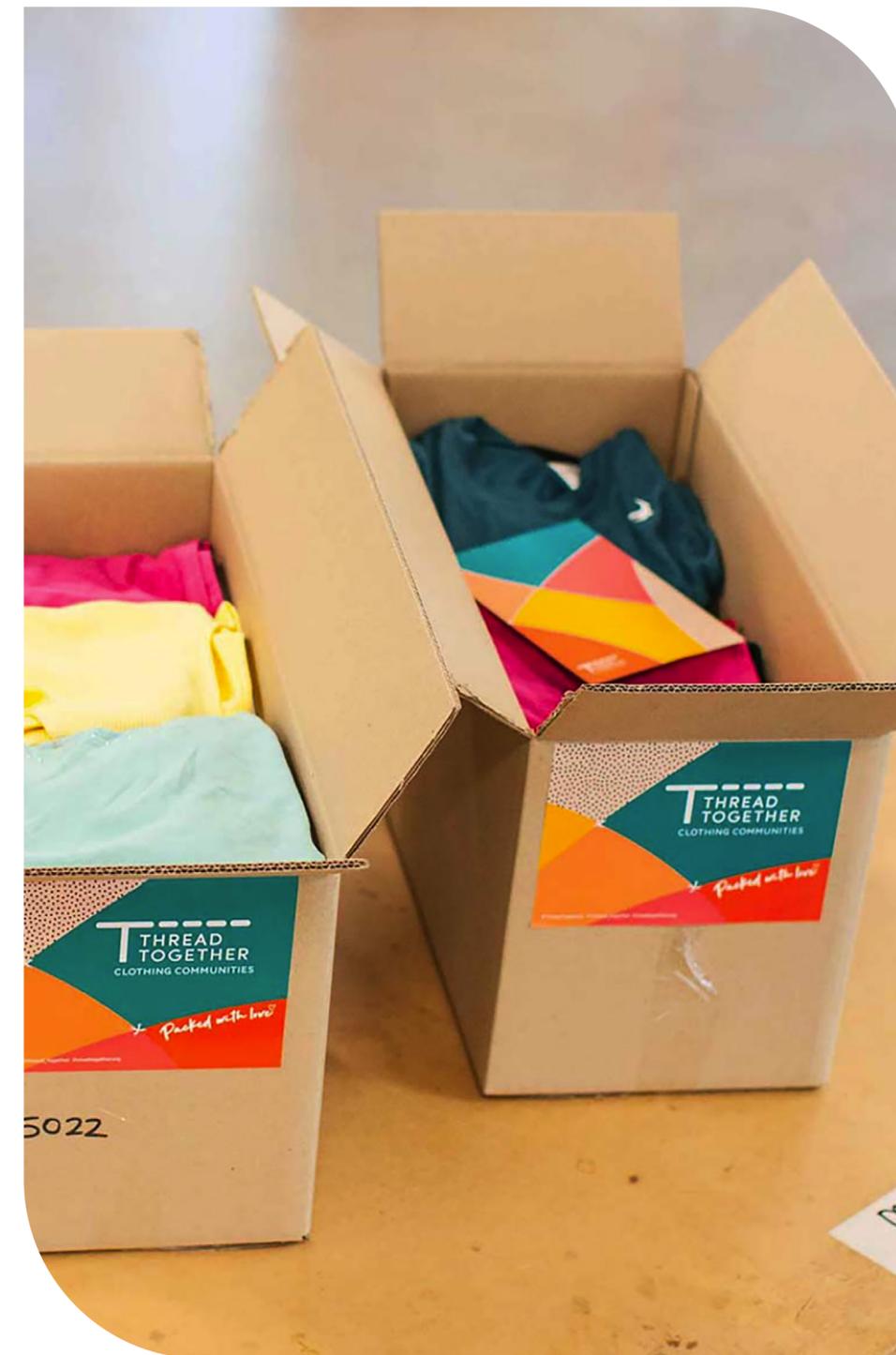
Increasingly, responsibility for the entire lifecycle of products is being shifted away from local governments and waste providers towards “producers” such as suppliers and brands.

“Over the last three years, the Australian fashion and textile industry has undergone significant changes,” says Thread Together’s CEO Anthony Chesler. “One of the most notable shifts has been towards sustainability and ethical production practices, with many brands focusing on reducing their environmental impact.”

Collaboration across the industry – including brands, manufacturers and suppliers – will be crucial in driving progress towards a more circular, sustainable future, he adds.

“In the next five years, we can expect to see increased adoption of circular business models and more investment in innovative technologies for textile recycling and upcycling.”

In the meantime, “we will continue to partner with fashion brands and retailers, locally and globally, to divert new unsold clothes from landfill and provide these clothes to people during their darkest times to restore dignity and hope”.



CASE STUDY

FASHIONING A MORE DIVERSE INDUSTRY

MENTORING KAMILAROI SWIMWEAR DESIGNER DAVID LESLIE IS A PARTNERSHIP THAT WORKS BOTH WAYS FOR ALÉMAIS' LESLEIGH JERMANUS.

Even after two decades in the fashion industry, Alémais designer and founder Lesleigh Jermanus still values the opportunity to talk through her ideas, collections and direction with a peer. "Sometimes when you talk out loud, things become a little clearer," she says.

It's exactly this type of support - along with insights into operations and industry contacts - that Jermanus hopes to offer Kamilaroi swimwear designer David Leslie of Gali Swimwear, who she is mentoring as part of the David Jones-supported Indigenous Fashion Projects [Pathways Program](#).

"I feel really humbled to be part of it," says Jermanus, who adds that Leslie has a clear vision for his brand and an "incredible" attention to detail.

"Sometimes it's just about having support," she says. "When you're growing and starting, you don't have a lot of people around you - it's not as though you can employ people. So it can be important to have someone to bounce ideas off. Even for myself - and I've been in the industry for 20 years - it's nice to be able to sit and talk with someone about your ideas and your direction."

However, Jermanus adds that the benefits of the program flow both ways. "I hope to provide insight into my world, but equally, would like to learn as much as I can about Aboriginal history and culture."

This the fourth year of the David Jones x Indigenous Fashion Project Pathways Program, which has included designers such as Jac Hunt and Lisa Dempsey of Jac &

Jack, Charlotte Hicks of ESSE Studio, and Mary Lou Ryan and Deborah Sams of Bassike as well as many more.

"Promoting cultural appreciation and uplifting Indigenous designers on a global stage is at the heart of what motivates us at David Jones," says Bridget Veals, General Manager of Womenswear, Footwear and Accessories at David Jones.

Adds Jermanus, "I think the only way we ever move forward is through collaboration and sharing ideas and stories, and I love that David Jones has been able to facilitate that."



CASE STUDY

A STYLISH SISTERHOOD

THOUSANDS OF WOMEN, INCLUDING FASHION FOUNDERS, AROUND AUSTRALIA HAVE RECEIVED SUPPORT VIA GLOBAL SISTERS.

As a child, Corina Muir always loved fashion, but never viewed it as a potential career. It wasn't until Muir became a single mother, wishing more flexibility in her career as an environmental campaigner, that she saw a way to combine her greatest passions – fashion, culture, country and the environment – by starting an ethical childrenswear label, called Amber Days.

“With Amber Days, everything we do has meaning, and we try to create change in the background by working with Aboriginal artists and using only ethical and sustainably sourced materials.”

Although Muir, a proud Yorta Yorta woman, has extensive experience in environmental campaigning and community organising – there were few people within her family or network that she could lean upon for business advice. That's where Global Sisters came in.

Global Sisters is a not-for-profit organisation that helps women overcome barriers and build successful businesses. With a special focus on supporting single mothers and older women, it connects up-and-coming entrepreneurs with training, micro-finance and pro bono assistance from some of Australia's largest corporations.

“We're a connector, connecting women to whatever they need, whenever they need it,” says Global Sisters founder Mandy Richards. “Women come to us at different times – some have already set up a business, some find us later or when they're stuck.”

“WE'RE A CONNECTOR, CONNECTING WOMEN TO WHATEVER THEY NEED, WHENEVER THEY NEED IT”

Since launch, Global Sisters has facilitated \$6 million worth of pro bono support - from business coaching to pro bono legal advice or creative services - thanks to its corporate partners. “We have MDs and CEOs of corporations offering that sort of coaching, so there's some amazing opportunities that come out of it,” says Richards.

Muir says Global Sisters' support has been invaluable.

“It's been super helpful to have a network of staunch women truly backing me, and to be connected with women also on their business journey,” says Muir. She joined Global Sisters' business education program, Sister School, and received support in market testing and launching her business, as well creating a business plan and applying for finance.

“They helped me with understanding whether my business was actually viable, and I've been able to go to them with specific needs and questions, and gotten support on that.”

THE CHANGING WAY WE DRESS

INSIDE AUSTRALIAN WARDROBES

BEYOND CUTS, COLOURS AND HEMLINES, ANOTHER, LARGER CHANGE IS UNDERWAY: A MOVE TOWARDS GREATER INCLUSIVITY.

Fashion is more than clothes or accessories, it is an expression of our collective identity, offering a glimpse into who we are as a society and how our lives are evolving.

In 2020, Australians' lives and wardrobes both changed when lockdowns began. Although fashion has been undergoing a steady casualisation for decades, that trend was accelerated by the pandemic. Almost overnight, Australians swapped suits for sweats, heels for flats – and three years later, office attire remains more relaxed than ever as many workers continue to work flexibly or remotely.

The pandemic also sparked a hunger for “dopamine dressing”, as consumers looked for moments of joy where they could find it, and in late 2022 Australians enjoyed their first summer unmarred by lockdowns or bushfires, and sales of statement pieces and partywear soared.

Today, oversized tailoring, “quiet luxury”, athleisure and Y2K dressing are among the most dominant trends.

FASHION'S MORE INCLUSIVE FUTURE

Just as fashion reveals who we are, it also offers insights into who we aspire to be, and in the past few years a seismic shift has been underway as fashion brands move towards a more inclusive future.

As celebrities like Harry Styles and Timothée Chalamet embrace gender-fluid style, and runways feature a more diverse range of models, a visible, if uneven, progress is being made.

Afterpay's latest findings confirm that Australians value inclusivity. One in seven of us are more likely to purchase from a brand that offers gender-fluid products, and one in four are somewhat more likely. Nearly two-thirds of women are comfortable crossing gender lines and dipping

into menswear, while the vast majority of Australians say it is "very" or "somewhat" important to see themselves reflected in fashion brand campaigns, rather than being presented with an aspirational ideal.

Yet demand often remains unmet: 40.2 per cent of Australians struggle to find clothes in their size, 27.2 per cent of shoppers believe Australian brands don't offer enough in the way of gender-fluid fashion; and some say they are locked out of fashion due to their disability.

It isn't simply the aesthetics of fashion that are evolving; more brands are examining the diversity of their own team, and embracing more inclusive hiring policies. There is also increasing appreciation for Indigenous fashion, with the industry creating more space for First Nations designers.

40.2%

struggle to find clothes in their size

3.8%

say their disability precludes them from purchasing garments they love

5.6%

of men are "very likely" do so

6.5%

are prevented from purchasing by a lack of gender-neutral options

25.9%

of men are "likely" to buy clothes or accessories that aren't explicitly for men

BUYING ACROSS BOUNDARIES

43.8%

of women are likely to wear menswear

14.3%

of women are very likely to do so



Learn more about the changing way we dress

CASE STUDY

THE INDIGENOUS SWIMWEAR LABEL MAKING WAVES

Perth-based Ihraa Swim is just the latest First Nations label gaining recognition for its ethical values.

When Nat Dann started her swimwear label, she had no fashion experience or connections – just a long-cherished dream of working as a designer.

“I’d always had a passion for design but growing up in a small town like Port Hedland that kind of ‘alternative’ career wasn’t seen as a realistic option,” she says. “It took a lot of passion, false starts and sleepless nights, but I figured I was just going to put myself out there and try to make something.”

“WE ALL HAVE UNIQUE STORIES”

Fortunately, Dann’s determination paid off. Just one year after launching Ihraa Swim with a small collection titled ‘Mermaid Queen’, her eye-catching tops, bottoms and rashguards have found a discerning following – and her label has been awarded the Australian Fashion Trademark.

“Gaining that recognition from the Afterpay Australian Fashion Trademark was fantastic because from the get-go I wanted my label to embody ethical and sustainable practices,” says Dann. “The Trademark is really powerful in communicating our values.”

Having launched last May at Australian Fashion Week, Ihraa Swim joins a growing cohort of swimwear and resort labels by Indigenous designers, including Liandra Swim and Maara Collective.

“I think we have a lot to offer the Australian fashion industry, as we all have unique stories,” says Dann. “Sustainability is embedded in our culture.”

“I grew up by the sea – I’m a saltwater woman and those stories were the most relatable to me. With swimwear, I could never find something that resonated, which was unique, fun enough and bold enough. So that’s what I set out to create.”

Each piece of swimwear is made from recycled plastic waste salvaged from the ocean and produced in Melbourne, which Dann says enables her to maintain full control and transparency. “I spent a lot of time investigating overseas production because I was told it was too expensive here, but that wasn’t true – and I wasted a lot of time and money finding that out!” she says. “It’s been quite the journey but now I’m looking forward to the next collection and bringing Ihraa Swim to a bigger audience.”



CASE STUDY

“WE HAVE SO MUCH MORE TO OFFER”

Indigenous fashion isn't just pattern and prints, says designer and multimedia artist Grace Lillian Lee.

In the past three years, the profile of Indigenous fashion has risen dramatically, says First Nations Fashion and Design founder Grace Lillian Lee.

She points to the development of industry partnerships with retailers, magazine editorials and events like Afterpay Australian Fashion Week's First Nations Showcase.

While change has been brewing for years, it was the Black Lives Matter movement that really moved the needle. "That really changed the game, with everyone - the industry and the community - more interested in getting involved."

But Lee says there is still room for growth, with understanding of Indigenous fashion still evolving. "I think people see textiles and print, and they think that's what Indigenous fashion is, whereas I think we have so much more to offer in terms of knowledge, from dyeing to weaving and storytelling."

Self-determination is another priority, with many First Nations designers keen to move beyond one-off product collaborations with other brands and instead create viable, commercial businesses of their own.

Currently many First Nations fashion initiatives are led by passionate individuals like Lee, who hopes the federal government will see the potential in the industry. "Indigenous fashion is such a beautiful way for us all to come together. It's not political, it's just a beautiful, fun, tangible thing."



CASE STUDY

THE BRAND PUTTING INCLUSIVITY FIRST

ETHICAL LABEL A.BCH HAS OFFERED GENDER-FLUID FASHION FROM THE BEGINNING.



When Courtney Holm threw a pre-launch party for her ethical fashion brand A.BCH, she didn't bother sorting the collection into menswear and womenswear. After all, most of the pieces were "classic basics" with broad appeal.

Her customers seemed to agree, because that evening, Holm noticed women trying on pieces that had been designed for men, and men selecting garments originally envisioned for women.

"That's how it started. People just gravitated towards the materials and shapes they liked. It wasn't really about having a gender assigned to the garment."

That was in 2017, and since then A.BCH has put inclusivity at the heart of its brand. Although its website features menswear and womenswear verticals ("we were advised to make sure we had men's and women's categories for search optimisation"), there is also a gender-neutral category and all products are photographed on both men and women.

There is increasing demand from non-binary customers, says Holm, who explains that A.BCH also offers customisations to help cater to gender differences. "So, we might need to elongate a crotch length or make sure there's room to layer different garments under a skirt if [a customer] wanted to wear pants under it." Sometimes, customers will ask for changes to accommodate sensory issues or disabilities.

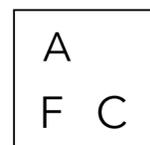
Holm believes that gender-fluid fashion is one more way to reduce fashion waste; after all, if the pool of people who can wear a garment is larger, then it's more likely the piece can be swapped or resold – and the less likely it is to end up in landfill. "For us, it's also about making people feel like their best selves."

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