

Learning from Market Identification of Japanese Fashion Designers: A Beacon of Hope for Sustained Traditional Textile Production

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Japan's textile heritage, a vibrant testament to its rich material culture (Parry-Williams, 2015), is a fabric treasure trove and a crucial element in the fashion industry. These textiles, a product of generations of human wisdom and tradition, serve as a testament to the past and a gift for the future (Dromgoole, 2009). Crafted by intricate networks of individuals, each contributing their unique skills in fiber, spinning, weaving, dyeing, and embroidery, these exquisite cloths (Cliffe, 2020; Hashino, 2012; Hashino & Kurosawa, 2013) are a living embodiment of Japan's cultural heritage. They also inspire and are championed by contemporary fashion designers, who are instrumental in preserving and promoting these traditional textiles in modern fashion.

Historically, textile makers in 56 major dyeing and weaving production areas wove a tapestry of diverse textiles. These cloths, a reflection of regional climate, materials availability, aesthetic preferences, and production specializations, adorned all Japanese clothing, from everyday wear to special occasions, primarily kimonos and obi (Cliffe, 2020; Maruyama & Michiming, 2012; Valk, 2018, 2020). The true custodians of this rich tradition, the artisans, not only crafted these textiles but also passed down their trade to apprentices, ensuring a continuous supply of textiles for clothing and the transmission of cultural knowledge. Their dedication and skill are crucial in maintaining the production of these traditional textiles and their cultural significance (Hall, 2015; Hareven, 2002; Moon, 2013).

The decline in demand for these traditional textiles can be traced back to the Meiji Era (1868-1911), a period of industrialization in Japan. This era saw a shift in the attire of male politicians and businesspeople, who started wearing Western dress at work instead of kimonos (Cliffe, 2020; Valk, 2018). The trend continued in the Taisho era (1912–26), when women began dressing their children in Western styles (Cliffe, 2020). However, it was not until the mid-1950s that the kimono fell out of use for women's daily wear (Cliffe, 2020; Gordon, 2012; Hashino, 2018; Valk, 2020). Women still wore kimonos for formal occasions, thus supporting the demand for traditional silk textiles (Cliffe, 2020; Hashino, 2018). Societal changes reducing interest in wearing kimono and the economic downturn of the 1990s vastly reduced kimono sales (Hashino, 2018; Valk, 2018). The 2015 industry market size was 10% of its mid-1970s size (Valk, 2018). Overall, there has been a dramatic decline in demand for kimonos and the traditional textiles used to make these kimonos (Hall, 2020; Hashino, 2018). As traditional textile producers have closed their shops, there is a grave risk of losing these crafts. The artisan's knowledge and skills in fiber producing, weaving, dyeing, or embroidery are not being passed on to the next generation, threatening the very existence of this cultural heritage (Hall, 2015; Hareven, 2002; Linton, 2020; Moon, 2013).

Researchers have investigated the technical properties of traditional Japanese textiles (e.g., Awazitani & Sukigara, 2015; Inoue & Niwa, 2010). Others have examined the influence of culture on textile makers' practices, bridging innovation and tradition (e.g., Linton, 2020; Parry-Williams, 2015; Yukimatsu et al., 2008). Fashion designers have begun to use traditional textiles for contemporary clothing to breathe new life into traditional Japanese textiles (Hall, 2015, 2020; Tamashige, 2014; White, 2018). Hall (2015, 2020) has investigated the efforts of designers in Kyoto, identifying how they have expressed Japanese culture through contemporary apparel design. Such efforts can potentially revive the traditional textile industry in Japan (Hall, 2020). However, to be effective, these efforts must be multiplied. There is limited practical information on Japanese fashion designers' strategies and challenges

when using traditional textiles. Such knowledge will enable more designers to use traditional Japanese textiles, supporting their continued production. Continued textile production will preserve the intangible cultural heritage of traditional Japanese textiles.

Research is the first step of the fashion design process, and a critical primary research stage is identifying one's target customers, their preferences, and their relative place in the market (Mbonu, 2014). Thus, the following research question was developed: What are the limitations and opportunities for designers' target customers and market placement when choosing to use traditional Japanese textiles for contemporary apparel designs? Five in-depth case studies were conducted, each centered on a designer. A mix of literal and theoretical replication cases, which are different in a purposeful way, was used to test the impact of traditional Japanese textiles vs. modern Japanese textiles to design contemporary apparel (Yin, 2003). The literal replications (companies L1, L2, and L3) used traditional Japanese textiles. The theoretical replications (companies T1 and T2) used modern Japanese textiles. Data was triangulated from designers' websites, publications, and social media; qualitative interviews of designers; and in-person observations of their businesses. All collected data was coded, grouped by theme, and then analyzed to identify commonalities and differences between cases and case groups.

It was found that using traditional Japanese textiles presents opportunities and challenges to fashion designers in identifying their customers and their place in the market. While such textiles offer exclusivity, niche markets, and higher price points, they also limit the designer. There are similarities and differences among target customers, which designers must consider.

- Customer profile. Designers from both groups identified a specific customer profile. Within companies, the profile varied by where the customer shopped (e.g., Tokyo vs. Osaka). Personal values or style seemed more of a factor than age. Creative professions were a common customer identity.
- Customer preferences. Both groups discussed customer preferences centered around fabric. Those using traditional textiles had to navigate challenges created by differences between the fabrics and customer preferences, such as fabric hand or available colors. In contrast, those using modern textiles could select fabrics to meet their customer preferences. Those using traditional textiles catered more to customers' preferences related to social trends, such as supporting local economies and sustainability by choosing quality over quantity.
- Customer motivation. Both groups' customers are interested in apparel made from Japanese fabrics but for different reasons. Customers of designers using traditional Japanese textiles seek connection to and want to support the local makers. By contrast, customers of designers using modern Japanese textiles appreciate the quality associated with "made in Japan" but are not seeking a connection with artisans.
- Niche, high-end market. Traditional Japanese textiles' hand-made nature naturally increases their cost of materials and, therefore, the price of garments, putting their products into the "luxury" category. Also, as each designer using traditional Japanese textiles tends to focus on a limited number of textiles, their designs are limited, which may contribute to the niche nature of their markets.

Findings provide practical information on the impact of using traditional textiles on designers' market research. Future work may consider the impact on other aspects of the design and production process and test the broader application of these findings to others seeking to preserve their traditional textile heritage by creating and selling unique products.

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