UNIVERSITY OF THE WITWATERSRAND

THE EMERGENCE OF ECO FASHION IN SOUTH AFRICA: FLEETING FAD OR ENVIRONMENTAL CONSERVATION BREAKTHROUGH?

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DECLARATION

I, **NYASHA GRACE GATAWA,** declare this thesis is my own unaided work. It is submitted for the degree of **Doctor of Philosophy in Science, Geography,** at the University of the Witwatersrand, Johannesburg. It has not been submitted before for any degree at any other university.

At this the 18TH day of December 2022

Signed

N.G. GATAWA

NYASHA GRACE GATAWA

TO THE FATHER I MISS DAILY,

BERNARD S.M. GATAWA, MY OWN DEAR FATHER, REST IN PEACE. I WILL MISS YOU ALWAYS AND YOU WERE A CHAMPION EDUCATOR AND A LEGEND IN YOUR GENERATION.

IN THIS YEAR 2022, HAPPY 100TH BIRTHDAY TO THE ICONIC AND MAGNIFICENT UNIVERSITY OF THE WITWATERSRAND, JOHANNESBURG, SOUTH AFRICA.

May the years ahead at the University be epic,

Happy 100th Birthday Wits.

Nyasha Grace Gatawa −0311578v

I WOULD LIKE TO PAY A SOMBER TRIBUTE TO BRAVE WARRIORS AND HEROES OF LIFE AND CADRES OF HOPE, LIVING AND DEPARTED GLOBALLY!

AS I FINISH THIS THESIS, I AM REMINDED RATHER STARKLY THAT WE ARE LIVING IN A TORRID PERIOD THAT HAS LEFT OVER SIX MILLION OF EARTH'S INHABITANTS DEPARTED. THAT BRINGS ME TO SORROW BUT AS I SEE THE FUTURE I SEE A LIGHT EMERGING ON THE HORIZON. I AM HERE! YOU ARE HERE! MAY THE PHD I SOUGHT BE POSSIBLE. MAY THE FAMILIES OF THE DEPARTED REST EASY AND THEIR MEMORIES BE ETCHED FOREVER IN ALL OUR HEARTS. FROM COVID- 19 WE WILL ARISE I PRAY😊

MY JOURNEY TO GEOGRAPHY BEGAN IN A PICTURESQUE AND SERENE VALLEY CALLED CHISHAWASHA VALLEY, AT THE RENOWNED SECONDARY SCHOOL IN HARARE, SAINT DOMINICS, WHERE I FLOURISHED. I RECALL MY FORM FOUR GEOGRAPHY TEACHER REMARKING QUITE HUMOROUSLY ON ONE OF MY REPORTS THAT MY QUIET NATURE WAS ONLY A FRONT FOR A GENIUS AT WHICH I LAUGHED. I HAD PASSED AT THE TOP OF MY GEOGRAPHY CLASS😊. A TEACHER GIVES HOPE AND THEY ALL DID AT MY SCHOOL IN THE BEAUTIFUL CHISHAWASHA VALLEY IN ONE OF ZIMBABWE'S MOST WONDERFUL SPACES.

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OPTIONS FOR THE VISUALLY IMPAIRED AND BLIND. SHE WAS A MAGNIFICENTLY REGAL WOMAN WHO INSPIRED MANY. HER LEGACY IS A TRIUMPHANT CELEBRATION OF REACHING TO ASSIST THE BROKEN TO HOPE. SISTER CATHERINE, REST IN HEAVENLY PEACE, A CHAMPION TEACHER AND ADVOCATE FOR THE BLIND IN HER GENERATION AND VOCATION.

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I REMEMBER RATHER SOBERLY THOSE WHO HAVE BEEN VICTIMS OF GENDER ABUSE WORLDWIDE, THE DISABLED AND FORLORN, THE REJECTED AND THE ABANDONED ALL OVER THE WORLD. I MUST MENTION THE 276 SCHOOLGIRLS ABDUCTED IN NIGERIA, THE ZIMBABWEAN WOMEN TRAFFICKED TO KUWAIT AND SO MANY TRAFFICKED VICTIMS AROUND THE WORLD AND ALSO MANY OTHERS IN COUNTRIES IN AFRICA AND BEYOND WHO WALK THE JOURNEY OF PAIN TO HOPE AND REDEMPTION.

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I MEET MANY FRIENDS AND KNOW MANY FRIENDS BUT OFTEN IN ONE-TO-ONE ENCOUNTERS. MAY THOSE FRIENDS STRUGGLING ARISE!

'IN ADVERSITY AND WAR, WARRIORS AND CHAMPIONS ARE BORN.' – N. GATAWA, MARCH 2022

ABSTRACT

From the iridescent sunny slopes of the Alps to the murkily golden streets of London to heritage rich Kazakhstan and wildly exotic Kenya as well as cosmopolitan upbeat New York, the global fashion industry has a creative vibrancy. The fashion industry reverberates with palpable regional inspiration, drawing global cultural energy and unique local design artistry. The rise of sustainable fashion has been concentrated in the more developed countries but has now seen local designers in South Africa launch eco collections as they focus on sustainability. Eco friendly fashion has the potential to change the landscape of the fashion industry in South Africa. The fast fashion/slow fashion dichotomy has been a central feature of the industry in recent years. The emergence of eco fashion in South Africa is also in line with the growing policy priority of the green economy and the circular economy principles influence on fashion design. There has been very little study on the fashion industry in South Africa and currently only a few researchers are working in this sector providing a gap for the study. This study focuses on small fashion design businesses operating in a formal manner across South Africa and their approach to environmental sustainability as well as their launch of eco collections. While only a few designers participated in the study, findings from the study can be extrapolated to the rest of the small-sector and also give clues to the way medium sized and large players in the sector are dealing with sustainability in their operations. The study investigates to a limited extent sustainability trends across South Africa documenting trends observable in large clothing chains. The study findings indicate a high awareness of sustainability from the garment or apparel maker standpoint yet a very evident lack of engagement by the targeted consumer in the markets surveyed. Eco fashion in South Africa has not been widely studied and this study seeks to fill in the gaps and contribute to current debates by focusing on small designers and how there is an emergent interest and focus on eco fashion. The study presents six cases that are analysed as comparative cases that can provide insight into trends in this sector in response to eco

fashion. The study was mainly a qualitative study relying on email surveys, telephonic interviews and other online and social media investigations. The need to interrogate eco fashion in South Africa is apparent and to see how developments in this sector could be an avenue to spread environmental awareness through the sector. Eco fashion has had a slow trajectory in the African market and this study addresses this. The COVID- 19 pandemic has cast a concerning shadow on the fashion industry globally, shifting consumer purchasing patterns, and may significantly impact the values and approach of the industry regarding sustainability. The COVID- 19 pandemic had a devastating impact on many industries globally and even as lockdown restrictions are now being lifted, the future remains uncertain in many localities. The fashion industry has been one of the most industries affected by the ongoing pandemic, with the closure of 'brick and mortar' shops at the height of the pandemic fury, and a move to online shopping more discernibly. The COVID-19 pandemic has highlighted the need for nature and mankind to find a symbiotic balanced relationship safeguarding biomes, ecosystems, and the fragile balance of nature. The pandemic has revealed real fragilities in the way mankind has interacted with and impacted nature. Social justice inequalities in the global fashion value and supply chains have also been revealed by the pandemic in a visible way especially in countries that use cheap labour. When the pandemic suddenly emerged across the world in early 2020 and as the virus shutdowns occurred, countries in the east like Bangladesh where fashion producing factories are located faced devastating financial losses and employee welfare imbalances were exposed almost immediately. Mass cancellations of scheduled fashion orders and scheduled deliveries to regions around the world hit factories in the east with real impact leading to factory closures and job losses particularly in the east (McIntosh, 2020). Eco fashion may have arrived in South Africa to herald a new era in garment making but against the backdrop of a time in history (COVID- 19) that has crippled businesses. The trajectory of sustainability in the South African fashion industry may well be derailed or significantly altered.

DEDICATION

I have walked under the embracing and regal shade of the baobab tree and the iconic mazhanje and muwuyu fruit trees as well as by the ocean and in the city, in the footsteps of giants, under the gaze of angels, and in the shade of mighty warriors!:)

I dedicate my PhD with much gratitude to my dear parents, the late Bernard S.M. Gatawa and my very gifted mother of strength and mirth, Judith Gatawa, a brave warrior moving forward with resilience and much courage. Her ability to strengthen me and all of her children and grandchildren is remarkable. A truly legendary woman I love. I am rather nostalgic as I remember my late father with bittersweet joy, fond memories, and a deep appreciation for all the ways he contributed to my life while he walked the earth. A man of formidable and exceptional intelligence, and a genuine pillar of integrity and wisdom. My father was an educator and ignited my love of learning and quest for higher education. He taught me to strive to achieve my potential in every sphere and the importance and value of discipline and perseverance. His encouragement and support from my very early years has been the wind beneath my sails, even now as the memories of our conversations and his words of wisdom remain like immovable pillars I can lean on. His wise words and cheerful encouragement are engraved in my heart. He instilled in me an immovable sense of my value and taught me to dream with abandon. I also dedicate this thesis with an unwavering depth of love and fun memories to a dynamic and invincible lady of faith and wisdom. My dearly beloved departed resolutely cheerful paternal grandmother, Mrs. Esther Matirangana Gatawa , a fun and comical golden girl and encourager in every season. A dearly missed gran and one of the best human beings I will ever meet and who supported my quest for knowledge. A real gem in her generation and a friend, sister, mother, and daughter of Masawi! Ambuya Gatawa was epic! Hallelujah! Merci! Tinotenda! Ngiyabonga! Vakuru vakafamba nesu zvokwadi. Our elders walked with me and still do😋

Munyika yeSouth Africa (in the land of South Africa), I faced many challenging experiences and fought countless battles but persevered to the hopeful attainment of my PhD by God's grace.

I emerge very resiliently built and have become a lioness of a woman who can face obstacles though my beginnings as a very delicate, protected, and premature child in my own Zimbabwe had predicted a journey less arduous. I emerge stronger and ready to move forward. Mwari wangu vakandirwira zvokwadi munyika yeSouth Africa. God fought for me in the great city of Johannesburg, South Africa.

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WB	WORLD BANK
AFDB	AFRICAN DEVELOPMENT BANK
AFI	AFRICAN FASHION INTERNATIONAL
CMT	CUT, MAKE AND TRIM OPERATORS
UN	UNITED NATIONS
UNEP	UNITED NATIONS ENVIRONMENT PROGRAMME
UNESCO	UNITED NATIONS EDUCATIONAL, SCIENTIFIC, AND CULTURAL ORGANISATION
UNDP	UNITED NATIONS DEVELOPMENT PROGRAMME
UNIDO	UNITED NATIONS DEVELOPMENT ORGANISATION
SA FASHION WEEK	SOUTH AFRICAN FASHION WEEK
IPCC	INTERGOVERNMENTAL PANEL ON CLIMATE CHANGE
WEF	WORLD ECONOMIC FORUM

CHAPTER ONE

Sustainable fashion in South Africa – An introduction to a study

1.1 Sustainability in the fashion industry

Ecologically friendly fashion, also known as eco fashion or sustainable fashion has brought a new dimension to the fashion industry and its popularity is slowly evolving from a fashionable trend for environmentally conscious celebrities to a fashion segment dispersing throughout the world piquing interest and gaining a following (Thomas, 2008). Sengupta & Sengupta (2020) note the challenges relating to sustainability in the fashion industry that have led to sustainable fashion noting the prospects and pitfalls of sustainable fashion and the growing awareness of the sustainability challenges in the industry. The proliferation of terms relating to green products or environmentally conscious products brings confusion although eco fashion and sustainable fashion are generally used interchangeably. Smal (2008; 2016) has contributed to this area and continues to investigate environmental concerns in the fashion industry in South Africa bringing light to a new domain. Professor Desiree Small continues to be a leading authority on fashion and sustainability in South Africa.

The question of the adverse effects of fashion on the environment has been raised in diverse locations, including South Africa. This research study delves into the potential of sustainable fashion within an African context and in a COVID era.

Environmental concerns have become a key global priority exacerbated by a marked deterioration in indicators of environmental degradation such as accelerating climate change, water scarcity, deforestation, increased population pressure on the environment and rapidly disappearing biodiversity, largely as a result of anthropogenic activities (UNEP, 2019). The fashion industry has a somewhat contentious relationship with the environment as its practices in production and distribution as well as waste management have significant adverse impacts on the environment, and this is a key theme in the literature (Shen, 2014, Moorhouse, 2020). While the fashion industry in South Africa remains a formidable economic sector, it has faced very visible viability pressures on the back of declining consumer demand and the continued undercutting of prices by Chinese imports, reducing the profitability and popularity of locally made fashion products. Fast fashion refers to the fashion segment that is popular at the middle to lower end of the market segment which is affordable but has waste management challenges related to the rapid disposal of clothing seasonally by customers as they upgrade their wardrobes (Khandual & Pradhan, 2019). Fast fashion is driven by trends on the catwalks of the world's leading fashion cities such as Milan and Paris and other fashion focused cities around the globe (Khandual & Pradhan, 2019) and has been widely driven by consumerism.

The longstanding criticism of the fashion industry related to adverse environmental impacts and the rise of fast fashion has put a searing spotlight on the unsustainable nature of the industry. The fashion industry has an adverse impact on the environment and sustainable fashion or eco fashion has become more visible in other regions with the shift in the importance ascribed to environmental issues and the rise of the green economy (Shen, 2014).

Fast fashion has indelibly changed the landscape of the global fashion industry resulting in mass consumption and consumerism fuelled by low prices and an enhanced and often obsessive trend focus (Ozdamar – Ertekin & Atik, 2020). Preau (2020) asks an important and pertinent question, Can the fashion industry be sustainable while it remains globalised? The global structure of the fashion industry has been a key driver of unsustainability in the fashion industry leading to the rise of fast fashion and its resultant adverse impacts on the environment. As Jacometti (2019) entreats, clothing production has doubled, fuelled by the number of garments purchased each year by a consumer which has been driven by the fast fashion industry and clothing can be thrown away after one season as consumers buy clothes frequently.

The controversial 'sweatshops' where production takes place in low-income countries like Bangladesh have put the social justice record of the industry in question and this has emerged across the globe (Sachs, 2005). Issue of social justice globally have often had disastrous outcomes and have risen to the fore in many industries. The tragic Rana Plaza collapse in 2013 in Bangladesh killed over 1100 garment workers and injured over 2200 revealing the dark side of the fashion industry and its true cost to those who make the garments in poor countries (Ozdamar-Ertekin, 2017, cited in Ozdamar-Ertekin, 2019). Garment workers depend on fashion industry jobs in countries like Bangladesh with few other employment options, especially for women, yet their working conditions are often very difficult, involving long working hours and low wages in dangerous and risky environments (Sachs, 2005; Brydges & Hanlon, 2020).

Environmental degradation driven by the fashion industry has positioned the industry as extremely unsustainable and while the advent of ecologically friendly fashion and other initiatives to safeguard the environment are welcome, there is still much work to be done (Shen, 2014; Guedes et al., 2020). The fashion industry is one of the most polluting industries in the world (Guedes et al., 2020). The environmental impacts of the fashion industry occur all over the world because of the organisation of the industry and it may be difficult to estimate the exact impacts (Jacometti, 2019). Life cycle analysis is a progressively popular tool for sustainability calculations and is a method used to evaluate the environmental impact of a product and takes a very numerical focus on identifying and quantifying drivers of environmental degradation (Kozlowski et al., 2012). Life cycle analysis has changed the way that environmental impacts are calculated, especially in large manufacturing companies. In the fashion industry, at each stage of the garments production, to final disposal, there are environmental impacts (Jacometti, 2019). Environmental impacts are calculated at pivotal stages of garment construction mainly in large factories although there are principles applicable to small design businesses considered in this study.

1.2 The significance of the fashion sector to economic development

The global fashion industry is a significant contributor to the global economy and is estimated to be worth as much as $2.4 trillion annually; if ranked alongside country GDPs the fashion industry would be the sixth largest economy in the world (Mckinsey, 2016). It is a diverse economic sector, comprising manufacturing, shipping, and retail as well as the more glamorous 'creative' elements of the sector such as design artistry, merchandising and advertising (Aspers & Skov, 2006). From the picturesque streets of Milan to the bustling sprawl of Lagos and Chandigarh, to the idyllic shores of Bali, the influence of the global fashion industry on everyday life is unquestionable (Crewe, 2008). The fashion industry exhibits immense creativity and dynamism but has also been implicated in a range of social and economic ills, from accusations of exploitative labour to unsustainable environmental practices.

The concept of fashion is a ubiquitous notion which traverses diverse categories such as clothing, cosmetics, furniture, design, motor vehicles, landscapes and much more but it is more commonly used to refer to the clothing and textile industry. There is often a further distinction made, between the larger clothing and textile industry and the high-end fashion sector associated mainly with leading-edge design and production. The industry also comprises the broader textile industry led by large fashion-houses and increasingly also by independent designers working on haute couture (high end fashion) in a more exclusive manner. The focus of this study is the small-scale independent designers and producers, who themselves represent a small fraction of the glamorous global fashion economy and whose own survival is perpetually threatened, yet whose service offerings are more bespoke than the 'cheap fashion' of the global textile economy.

Fashion design is classified as a component of the creative industries which are taking an increasingly pivotal role in economic policy worldwide. The creative industries have significant financial worth and are the drivers of cultural content and local flair in many regions, including Africa (Creative Industry Scoping Report, 2008; African Development Bank, 2019). The creative economy is a pivotal component of economic development and entrepreneurship contributing 3% to global gross domestic product and it is 'a powerful emerging economic sector that is being strengthened by a surge in digitalisation and services' (UNCTAD, 2019). The importance of the creative economy to the Global South is increasing as it is a policy priority positioned strategically for job creation and entrepreneurship contributing to sustainable livelihoods in South Africa (Oyekunle & Sirayi, 2018). The sector has both 'commercial and cultural value' and has been an important element of economic diversification strategies (UNCTAD, 2019). The contribution of the fashion industry to the creative industries is significant and more focus to revive and grow the fashion industry in different regions of the Global South has been noted. The creative industries, as a whole, are a pivotal pillar in many African economies, creating excitement and exuding cultural energy and with economic influence and significance (Creative Industries Scoping Report, 2008). Adebola-Oyekunle (2017) highlights the strategically important role played by the creative industries in South Africa and their ability to play a role in economic development and economic regeneration and in driving entrepreneurial endeavours. The emerging bespoke fashion sector has been an important part of this revival. Fashion designs, unique in their artistic inspiration and bringing local and internationally driven inspiration bring the industry to life in a remarkable way, creating a vibrant economic sector with influence in diverse regions of the world (Mckinsey, 2020).

The African fashion industry had risen to the global stage with the advent of fashion week events and a globalized world made the diffusion of trends within the industry possible, with just a swipe or a click of a button (Rogerson, 2006; Jennings, 2011, Aziz et al. 2019).

Famous African fashion fabrics like Kente, Dashiki, Shweshwe and others have been incorporated into distinct fashion ensembles creating an African fashion aesthetic that has gained a following globally. These designs that mix traditional fabrics and the newer more contemporary designs have emerged bringing a novel aesthetic in the formal small-scale fashion industry. There is a very evident mix of modernity and tradition which situates the designs emerging from small-scale formal designs in a unique space.

Fashion is an important and visible element of the economic landscape of Africa and an integral component of the creative and artistic positioning of African cities. Informal fashion markets selling affordable clothing are a feature of many African cities, signalling an industry which is vibrant and innovative and a key part of the cultural and economic environment of cities throughout the continent (Aziz et al. 2019). Africa has been hailed as an influential region in the global fashion sector steeped in its history of fashion dynamism embodying indigenous fashion traditions which have been a key part of the continent's cultural identity for centuries (Jennings, 2015).

The fashion industry is a very complex, interconnected but fragmented industry where artisan tailors, haute couture, multinational fashion retailers and luxury corporations coexist (Kozlowski et al., 2012; Arrigo, 2015, cited in Ozdemar-Ertekin, 2019; Teibel, 2019). The global fashion industry is a key contributor to global employment and employs over 60 million people worldwide (Teibel, 2019). Global value chains have characterised the organisation of the fashion industry and the fashion industry has become more reliant on global sourcing (Muhwati & Salisbury, 2017). There has been a very definite shift to fashion business models with an enhanced focus on global markets for consumers and suppliers and a more competitive marketplace globally (Rainer, 2015). Jacometti (2019) draws salient attention to the global nature of the fashion industry highlighting its key components and organisation. The fashion industry creates global value chains where the various stages of production take place in different countries, complex chains that are strongly connected to each other and include design, manufacturing of materials and the fashion products such as textiles, clothing, footwear, leather, and fur. While South Africa has managed to access global markets there has been fierce competition with cheap fashion from China and other markets that have flooded the globe as 'fast fashion'. Many countries have been left reeling by fast fashion and where production can be so cheap and competing with such products becomes difficult.

1.3 COVID- 19 and the ongoing impact on the fashion industry

COVID- 19 has changed the landscape of the fashion industry; before the pandemic the global fashion industry was a fast-changing, trendsetting industry and had a significant economic contribution across different regions and in changing ways (Mckinsey, 2016). The ongoing question of the fashion industry's ability to be viable in the COVID- 19 era is a concern. COVID-19 has brought light to the geographic differences in how workers are treated in the fashion industry (Brydges & Hanlon, 2020). Visible workers such as retail workers are supported and have fairer labour policies than invisible workers such as garment factory workers who may be subject to unfair labour practices and working conditions (Brydges & Hanlon, 2020). The entire fashion sector has been impacted by the pandemic resulting in changes to how customers are able to access stores as a result of strict lockdown and shutdown policies as well as an increased move to e-commerce platforms in response to store closures (D'adamo & Lupi, 2021). While the lockdown restrictions are now being lifted, the threat of the virus still represents an impediment to customers unwilling to visit the stores. Small scale producers have been impacted by the ongoing challenges of the pandemic and in this thesis we will try and unpack how they have been impacted.

1.4 Aim and objectives of the Study

In the preceding section small-scale bespoke fashion producers were located within a larger fashion sector and the focus was on questions of sustainability within the sector, which have more recently gained much significance, and the move towards a more sustainable fashion industry. Small scale producers might offer one opportunity for a more sustainable attitude towards fashion, especially in the global South: this is precisely the question that this thesis aims to engage. The emergence in the past two years of the global coronavirus pandemic poses huge challenges to the economic sustainability of the fashion sector in general - and small-scale producers in particular. The tentative emergence of eco-fashion trends among consumers in the global South may be threatened by the economic impacts of the pandemic. This then is the second aim of the study: to explore the impact of the pandemic on these small-scale producers and to explore the possibilities for environmental sustainability in the sector as a result of the pandemic.

Stated more clearly, the aim of the study is to explore the response of small-scale fashion designers in South Africa to emerging discourses around sustainability in the industry, especially in the context of the coronavirus pandemic

Small-scale designers are increasingly important to the fashion industry due to the ease of entry of new designers and why they can catalyse trends and growth in the industry. The focus in this study is on small-scale designers that operate in a formal and lean manner with a few staff and are located in urban spaces and many in shopping malls and other shopping spaces and recreational precincts.

In this study, sustainability will be interrogated from a largely environmental standpoint but will also include and interrogate social and economic sustainability drivers of sustainability. The question of sustainability in the small-scale fashion producer sector in South Africa cannot be divorced from the general economic sustainability of the sector and will be investigated in the context of an increasing shift towards environmental sustainability in the discourse, if not among consumers per se. Economic and social concerns have played a more pivotal role in questions of sustainability often overriding or presenting a threat to environmental sustainability as they may be a more immediate concern to small scale producers relating to questions of viability.

The objectives of the study therefore are:

i. to broadly map and analyse the existing context of small-scale fashion producers in South Africa within the context of global mass-production and the destruction of the local textile industry.
ii. to understand the ways in which these producers are responding to environmental sustainability discourses in this sector: whether from the production or consumption side.
iii. to understand the ways in which a global economic and social shock like COVID-19 impacts the sector, and in particular its engagement with sustainable practices.

The three objectives are closely related to the main aim of assessing how small-scale producers are engaging with questions of sustainability in a COVID- 19 era which presents unique challenges. The mapping of the operations and current context of small-scale fashion producers brings to light some of the challenges and specific experiences of these producers as an emerging sector in South Africa which may impact sustainability and the historical profiling of how the larger clothing and textiles industry has evolved sheds light on how the industry may evolve in the future. The COVID- 19 pandemic has been an unexpected occurrence that has impact on questions of sustainability in the fashion industry including small scale producers from an environmental, economic, and social standpoint.

1.5 Methodology

The COVID-19 era has cast a viability shadow on the fashion industry (McIntosh, 2020) and this study has been modified from the original proposal to address limitations arising from social distancing rules and lockdown restrictions. The pandemic hampered access to respondents and added a layer of difficulty in accessing willing respondents. The initial methodology outlined in the proposal was largely based on in-depth semi structured face to face interviews with fashion design businesses in Johannesburg and in the Johannesburg Fashion district as well as other mini centres of the fashion industry around the city, as well as consumer surveys supplemented by documentary analysis. The research approach was changed to a largely online and remote study with data collection carried out telephonically, via email and other online approaches and with a focus countrywide. Document Analysis also took a greater role in the study than initially had been anticipated because of the pandemic which limited and hampered access to willing and available respondents in a sector that had been upended by the virus.

The study employed a qualitative approach. The data collection involved an online email survey sent out to fashion designers listed in the SA Fashion Week handbook which focuses on small scale designers in early 2020 and at the start of the global pandemic. Over 70 online surveys focusing on questions largely relating to environmental sustainability and how designers were incorporating environmental practices into their operations as well as their propensity to launch an eco-fashion brand, their customers attitudes towards environmental sustainability and in subsequent follow up online interviews were also asked about their experiences in the COVID- 19 era. The response to the online survey was variable probably because it was sent out at the beginning of the pandemic and when businesses were grappling with questions of viability and how they were going to respond to the pandemic. It was interesting to note that higher response rates were from white woman. In light of the relatively poor response to the email survey, I undertook in-depth interviews with six designers to interrogate the designers’ approach to sustainability, comparing and contrasting how different designers were engaging with questions of sustainability, and their experiences of the COVID- 19 era. These were complemented by telephonic interviews with several key figures in the fashion and textile sector. I had intended to conduct several interviews with customers in South Africa of the small-scale designers, but this did not happen due to COVID- 19 restrictions.

The combination of the online email survey, telephone interviews, WhatsApp conversations and document analysis was aimed at engaging with the three objectives of the study, i.e., mapping the small-scale fashion producer within the textile and fashion industry in South Africa, assessing how designers were engaging with sustainability in their business models and assessing the impact of the pandemic on small-scale fashion producers and the broader fashion industry.

The online email survey provided insight into the sustainability practices of the six fashion designers and with a particular focus on environmental sustainability practices. Responses to the online email survey brought to light the fashion designers’ attitudes towards the environment and also their opinion of their customer’s engagement or concern with the environment when purchasing clothing. The online email survey assessed the ways in which fashion designers were engaging with sustainability in their business model looking at specific environmental practices such as waste management, the use of chemicals and dyes, transport practices and their incorporation of sustainability principles throughout the supply chain from procurement to manufacturing , distribution, and retailing. Designers were also asked to indicate their propensity to launch an eco-collection or an environmentally friendly fashion brand. While the online email survey was designed to interrogate issues relating to environmental sustainability, the survey also brought to light social and economic sustainability issues, clearly showing the multifaceted nature of sustainability and importance ascribed to economic sustainability or financial viability in this industry. The decision to keep the informants anonymized was stressed to them and they agreed to participate based on that basis.

In follow up WhatsApp discussions and further online discussions the designers' experiences during the COVID- 19 era were probed. Websites and other publicly available information on the designer's businesses also revealed how sustainability was incorporated into their business models and shed light on other operational, marketing, branding and product nuances. The history of the fashion industry in South Africa was documented in a review of journal articles and publicly available reports which traced the history of the industry from the apartheid era to recent developments that have shaped the trajectory of the industry. Research conducted on social media also illuminated emerging consumer trends in relation to sustainable fashion, and the rise of sustainable fashion as a vibrant area of discussion and interrogation amidst rising concerns regarding the anthropogenic impacts on the environment and a rising wave of environmentalism.

1.6 Scope of study/Delimitations of the study

The study was initially aimed at developments in the city of Johannesburg only, but the COVID- 19 pandemic changed the scope of the study to other regions in South Africa and adopted a sampling method based on the willingness of respondents to participate in the study. The researcher was locked out of South Africa during 2020 and 2021 in Zimbabwe which complicated aspects of data collection. The final scope of the study was very dependent on the accessibility of respondents and the willingness of respondents to provide accurate and timely information and may be impacted by a particular respondent's awareness of environmental issues. There has been widespread advocacy to highlight environmental issues, but this has not always translated to proactive actions by individuals or organisations to adopt environmentally friendly practices. The researcher's prior experience conducting research in the fashion industry in 2005 and 2006 indicated that fashion designers were willing to participate as research respondents if the proper procedures to recruit and carry out the research is conducted professionally and timeously (Gatawa, 2008). The COVID- 19 pandemic hampered access to respondents in this study. The unexpected advent of a global pandemic was a significant limitation to the scope of the study in a way that had not been anticipated. A supervisor change also resulted in changes to the study methodology. The thesis has its theoretical framework rooted in a number of disciplines which provide a roadmap for the study. The study draws from environmental literature, sustainability literature and the focus on developments in the fashion sector as well as delving into marketing theory and consumer behavior theory. The analytical application was hampered by the number of respondents but in looking at each producer as a case study trends that can be cascaded to the whole industry can be extrapolated. Thematic content analysis was used to identify key trends emerging in the designer interviews and other key informants

1.7 Structure of the Thesis

Chapter One is the introductory chapter and outlines the background to the study delving deeply into recent developments in the global and local fashion industry as well as the increasingly pivotal role of the fashion industry in the creative economy. The aims, research positioning and overall context of the study is situated in this chapter preparing the reader for the subsequent chapters in a revelatory way. The aim of this chapter is to provide a convincing rationale for the study and introduces the reader to what they should expect in the following chapters. This chapter will briefly delve into the available literature. Eco fashion's early roots can be traced to the early 90s when in 1991 the sports brand Esprit launched their eco fashion brand. Eco fashion has risen in popularity gradually over the years and as environmental considerations become significant in every industry. Methodological considerations relevant to the study are in this chapter.

Chapter Two presents a review of literature with more detail than the abridged literature review in chapter one. The aim of the detailed literature review is to provide convincing arguments as to the merits of the study and what new contribution the study will make. The aim of this chapter is to really delve deeper into the largely western based and Asia based research focusing on sustainable fashion as well as the limited African studies with other regions sporadically. The chapter will situate the research in the broader ambit of emerging researchers investigating sustainable fashion with a focus on the supply chain. The need for the fashion industry to reverse its traditional associations with negative connotations and scandals relating to the environment is a key theme in the literature. Issues of pertinent South African environmental and social justice issues are interrogated in this chapter.

Chapter Three describes the methodology adopted in the study and presents the methodological amendments made to the research plan in response to the sudden onset of the COVID- 19 pandemic. The experiences of the researcher while conducting the fieldwork aspect of the research is outlined as well as the rationale for the choice of research method and its appropriateness for addressing the objectives of the study.

Chapter Four will provide an analytical review of the South African clothing and textiles industry highlighting key features of the clothing and textiles industry in South Africa and the developments that have occurred post-apartheid that have changed the contribution of the industry to the economy as it has faced increasing global competition. The rise of small-scale independent fashion designers in South Africa has been transformative to the clothing and textiles industry. There has also been an evolving design aesthetic in the South African fashion industry post-apartheid drawing local inspiration but with a contemporary and global focus leading to a very diverse and unique fashion aesthetic and positioning in the post-apartheid years. The clothing and textiles industry in South Africa continues to face myriad challenges which have cast a shadow on the operation of the industry, exacerbated by the sudden onset of the COVID- 19 pandemic.

Chapter Five presents an analysis of the ways in which designers who participated in the study are engaging with questions of sustainability. Insights from key informant/expert interviews conducted telephonically and online with a focus on establishing views and approaches to environmental sustainability and sustainable fashion in a South African context and in a COVID-19 era are also presented.

Chapter Six engages with the impact of consumer demand on sustainable fashion. Who is the South African consumer and what characteristics, predispositions and attitudes impact their sustainable fashion purchasing behaviours? In this chapter factors relating to South African consumer characteristics and global consumer behaviours towards sustainable fashion are explored. The consumer is a key determining factor of the success or failure of sustainable fashion and eco fashion brands in different markets. Research conducted on social media sites in relation to the engagement of consumers with the concept of sustainability and their attitudes towards sustainability overall is also in this chapter with the aim of trying to ascertain how consumers are responding to sustainable fashion. The purchasing behaviour of consumers has been studied in different markets and while the South African consumer is indeed different from other regions in many ways, there may be commonality and trends that are similar. In this chapter, theories relating to how consumers make decisions regarding sustainable fashion are outlined and analysed in a review of research on consumer purchasing behaviour relating to green products and sustainable fashion in different regions of the world.

Chapter Seven focuses on the impact of the COVID- 19 pandemic on the fashion industry with particular emphasis on the impacts on small scale producers. The COVID- 19 pandemic has adversely impacted the fashion industry. This chapter presents a review of recent developments in the global fashion industry in the COVID-19 era conducted in mid-2020 and the challenges facing the sector during the pandemic. The review of the unfolding impacts on the global fashion industry and sustainable fashion in the COVID- 19 pandemic revealed a global fashion industry in distress, facing myriad challenges, and the details of this analysis will be presented in this chapter. Impacts on small-scale fashion producers in South Africa will also be reviewed and their concomitant implications on sustainable fashion. Fashion businesses have been hard hit by the pandemic and signs of significant financial distress have been noted across many regions, including Africa. While the outlook for the fashion industry remains uncertain during and after the pandemic, is there a hope for sustainability?

Chapter Eight is the final chapter of the study which aims to present the conclusion of the study and to discuss salient findings relating to the objectives of the study. The researcher set out to uncover the strides made by South African small-scale producers to incorporate into their processes environmentally sustainable practices and to make a tangible contribution to environmental conservation in South Africa. There is a growing body of research on sustainable fashion in Africa and in South Africa but there has not been conclusive research on the potential for eco fashion or sustainable fashion to move beyond a fad or trend to a widely adopted segment of the fashion industry, especially in the Global South. This study adds a new voice to the researchers working on sustainable fashion in South Africa and in pockets around Africa. The aim of the study was to explore the manner in which fashion designers are engaging with sustainability in a COVID- 19 era and in this chapter that will be critically assessed and critiqued against the background of the work of other researchers working in this field.

CHAPTER TWO

The Globalisation of the fashion industry

2.1 Introduction

In this chapter a review of pertinent literature on the rise of sustainable fashion is presented as well as information on sustainability in general and the global fashion industry. Globalisation has led to the emergence of a formidable, globally focused fashion industry with significant economic impact across countries worldwide, catalysing entrepreneurship and drawing from culture, media, developments in creative innovation and national identity to create riveting designer fashion ensembles. This chapter delves into the increasingly significant debates and critically relevant literature on the fashion industry, environmental sustainability in the fashion industry and sustainable fashion globally and in South Africa. The aim of the review of pertinent literature and engagement with key debates frames the research in the contemporary focus of academic enquiry into the fashion industry.

Small-scale designers operating in a formal way and skewing to target the higher end consumer market are the focus of this study and play a key role in the greater fashion industry and are increasingly seen as trendsetters in the industry in many ways. The diversity of small-scale fashion producers is one of the key features of this industry and in South Africa they are a focus of attention especially for those seeking a foothold in the industry. Challenges exist in this sector but has not stopped the growth of this sector. The possibility of changes in this sector catalysing change is apparent as large scale fashion outlets often commission designers in this sector to make clothes for them widening the reach of small scale designers. This has a bearing on this study as it means trends in this sector increasingly have wide reach beyond that small boutique outlets. While this sector is admittedly small its influence is far-reaching and the potential of impacting aspects of sustainability negatively especially social injustices.

2.2 Academic debates on sustainability in the fashion industry

Globally academic research relating to the fashion industry is increasing as the sector takes on a more pivotal role in economic development strategies and the rise of sustainable fashion has fuelled further research interest. Environmental challenges relating to the impact of anthropogenic activities on the fashion industry are a growing cause for concern. The centrality of debates around sustainability in the fashion industry and a call for greater transparency and accountability by the fashion industry regarding its environmental practices has positioned sustainable fashion research as one of the most vibrant and exciting in fashion studies in the 21st century (Fletcher, 2007; Root, 2008; Caniato et al., 2012; Partzsch & Kemper, 2019).

Overall, while fashion as an area of academic enquiry has attracted global research interest the scope of the research has remained more focused on the developed world (Shen & Li, 2019). There is also a significant body of research from Asian countries and the pacific region (Todeschini et al., 2017; Shen & Li, 2015; Shen & Li, 2019). The rise of Asia as a significant region in the global fashion industry is a key feature of the fashion industry in the 21st century (Khandual & Pradhan, 2019) and the Asia region as a whole has become a formidable economic region. The global increase in research on the fashion industry has shed more light on an industry that was somewhat shrouded in mystery across many regions and was often not taken very seriously as an academic discipline. The fashion industry has become more entrenched as an academic discipline and has taken a more pivotal role in the creative economy (Caniato et al., 2012). Similarly, the nexus of fashion and the environment has gained increasing research interest but remains an under researched area, especially in Africa.

Root (2008:420) celebrates the significance of the rise of eco fashion and identifies sustainability as a new field of focus in fashion studies and that the 'lens of sustainability' and the culture of sustainability has transformed the fashion industry repositioning the industry and providing a different path for the industry in the 21st century. There has been a very evident increase in research focused on sustainable fashion, but the nature and focus remains somewhat fragmented in many ways (Mukendi et al., 2020). Additionally, as highlighted by Davies (2015), most studies on sustainable fashion have focused largely on the production side of sustainable fashion and not on actual consumers of sustainable fashion.

In the global north, sustainable fashion is increasing rapidly as an area of research enquiry (Suhad et al., 2020), this has not been the case in the global south, including Africa. Furthermore, there remains a paucity of research into the fashion industry in Africa and South Africa, despite the industry's more visible profile on the global fashion stage. Farber (2010:128) draws attention to the 'underexplored' nature of the fashion industry in South Africa as an agent of socio-cultural change highlighting that the 'field of fashion and its propagators is firmly woven into the social and economic fabric of post-apartheid South Africa.' Farber (2010:159) further suggests the hybrid nature of South African fashion design which offers the consumer a mix of identity options. She refers to an 'African fusion' dynamic emerging in South African fashion design that incorporates ' a borrowing and lending between cultures and traditions' as part of their design aesthetic (Farber, 2010:159). She further stresses the need for serious academic enquiry into South African fashion design. This is corroborated by Langevang (2016) who notes the international emphasis on the creative industries in Africa but highlights that there is still need for more support and policy attention aimed at the creative industries in Africa.

The debates focusing on achieving sustainability in the fashion industry versus the quest for profitability in the manufacture of fast fashion have clouded the likelihood of an easy road to sustainability for the fashion industry and this has been noted and examined in much of the literature. Fast fashion is positioned as opposite to sustainable fashion and the principles of incorporating sustainability principles in the fashion industry (Woodside & Fine, 2019). Hackney et al. (2020) drew attention to the rising concerns around the impact of fast fashion and the need for a multi-faceted intervention to impact behaviour of consumers and to steer consumers away from fast fashion to more sustainable fashion choices. Greco & De Cock (2021:55) refer to the public debates around sustainable fashion as 'very lively' with a number of actors holding particular views and often entrenched and divergent views and while the focus has been largely on environmental concerns, it is also noted that social rights and human rights have also been part of the debates. A rising eco consciousness amongst consumers has brought sustainability issues to the fore of debates in the fashion industry (Sengupta & Sengupta, 2020). The role of the designer in aiding the move to a more sustainable fashion industry is becoming recognised and that design practices play a role in achieving sustainability in the fashion industry (Claxton & Kent, 2020).

2.3 Covid-19, impact on the fashion industry and trends in the global economy

The unprecedented COVID- 19 pandemic has added a layer of complexity to the operations of industries worldwide and this study is carried out against the backdrop of changing economic forecasts for most regions and an air of uncertainty prevailing across industries and countries. The COVID- 19 pandemic remains a threat to business viability and to the continued existence of many businesses (World Bank, 2020; Mckinsey, 2021; Urminova & Kusa, 2021). It is difficult to forecast the economic landscape after the virus, but it is very likely that the fight to contain the pandemic will be protracted and economic activity will be severely disrupted leading to an uphill struggle to recovery, and it may take a very long time to see businesses return to viability. A 5.2 percent contraction in GDP is estimated worldwide which will lead to the worst recession in decades (World Bank, 2020). Strategic priorities for businesses of all sizes that remain operational after the virus will most likely change significantly as industries and sectors grapple to return to normality in a recessionary environment. What will happen as the effects of the virus become clearer will certainly have a bearing on the positionality of environmental concerns in the fashion industry. In the fashion industry profitability concerns have tended to override environmental issues, and this may be the case after the virus. The fashion industry has also been severely disrupted by the pandemic, and it remains to be seen what will happen to the industry as the virus threat unfolds and ends hopefully in a reasonable period of time. Many regions are expected to experience substantial growth downgrades and sub-Saharan Africa by 2.8% (World Bank, 2020; StatsSA, 2021).

2020 was a disastrous year for economies worldwide, including the South African economy. Growth in the South African economy was impacted sharply by the COVID- 19 pandemic. The South African economy declined by 7% in 2020 compared to 2019, despite a positive growth trajectory in the third and fourth quarters of 2020 (StatsSA, 2021). This impacted all sectors including the fashion industry and small-scale sector quite markedly. The decline in economic activity in 2020 was driven by the sudden onset of the COVID- 19 pandemic and especially marked in the lockdown era. Second quarter growth was severely impacted by the stringent lockdown restrictions prevailing and the economic downturn experienced in 2020 was the worst recorded since 1946 and even surpassed the decline recorded in the 2008/2009 global financial crisis (StatsSA, 2021). The manufacturing sector in South Africa recovered to some degree in the third and fourth quarters of 2020.

The South African fashion industry has in recent years shown a positive growth trajectory, but the impact of the COVID- 19 pandemic is expected to be particularly virulent. According to a recent study conducted by the Department of Trade, Industry and Competition and the South African Cotton Cluster the South African fashion design sector contributed R1 billion to GDP in 2019 (DTI & SACC, 2020). These forecasts reflect an industry with potential and a significant market segment, but the advent of the COVID- 19 pandemic has cast a shadow on the industry as uncertainty prevails and the industry grapples with remaining profitable in a markedly changing and uncertain environment.

The environmental justice movement has changed the landscape of many industries and the fashion industry has traditionally been associated with exploiting its workers and having adverse impacts on the environment and this needs to be interrogated (Aspers & Skov, 2006). Social consciousness, eco consciousness and a more ethical approach to fashion has been a trend and millennials and Generation Z consumers have been at the forefront of these trends and are willing to actually act on their beliefs although older consumers have also engaged with this trend (Blake & Callahan, 2019).

The fashion industry in Africa and certainly in South Africa has not been a subject of prolific research but there has been an increase in the number of researchers. There has been an encouraging increase in research, but the South African fashion industry remains a field of study that has not been adequately explored, particularly relating to environmental concerns (Rogerson, 2006; Adinolfi et al., 2018). Smal (2008; 2016) engages with issues of sustainability in the South African fashion industry through the lens of a design centred praxis and continues to make an important contribution to this area of study. Smal (2016) draws attention to the challenges in operating sustainably in the South African design sector particularly regarding the lack of resources for garment construction in an environmentally sustainable way. She also alludes to the declining clothing and textiles industry in South Africa as a major impediment to sustainability in the industry. Fashion tourism has also been a focus of research in Africa and specifically the potential of the fashion industry to catalyse the tourism industry (Gatawa, 2008; Adinolfi et al. 2018).

Sustainable fashion developments in this study are examined from a sustainable supply chain management approach (SSCM) interrogating indicators of sustainability throughout the supply chain such as resource management, procurement practices, production practices, logistics and waste management. The use of supply chain modifications and interventions has become apparent as a way to reduce the environmental impacts of the fashion industry. The launching of eco fashion brands in South Africa by South African designers is a relatively new development, this thesis will also investigate more broadly the adoption of environmentally friendly practices in the South African fashion industry by large clothing retailers although this will be a small component of the study. The Johannesburg Fashion District included in the study is key to investigating the role of clusters or industrial districts in catalysing sustainability. Issues of environmental justice in the local fashion industry are central to this study and how sustainability can coexist with very real economic and poverty challenges in a country like South Africa with very marked societal and income inequalities. The challenges in the fashion industry where the incorporation of sustainable practices has to be weighed against viability and profitability concerns present a conundrum that is likely to emerge from this study (Gatawa, 2008; Rogerson, 2006).

The increase in the body of research focusing on the fashion industry is encouraging but there has not been a consistent output of research which is somewhat of a paradox as there is evidence that the fashion industry is able to contribute significantly to economies worldwide and across many African economies. Research investigating environmental practices in the fashion industry and the emergence of the eco fashion industry is still largely concentrated in the more developed regions of the globe (Caniato et.al., 2012). Research focused on sustainable supply chain management in the fashion industry and creating sustainable supply chains in the fashion industry has not been explored in depth in the literature leaving gaps for further research particularly in the Global South (Turker and Altuntas, 2014).

2.4 The rise of the fashion industry and the emergence of sustainable fashion

The fashion industry is a highly globalised industry (Ciarniene & Vienazidiene, 2014) and has a long and illustrious history beginning in the second half of the 19th century and with its global roots in Paris. The designer fashion sector has its roots reaching back to the very rudimentary construction and assembling of garments and has risen in sophistication with world renowned brands such as Louis Vuitton, Hermes, Bottega, Valentino, Burberry, Michael Kors, Ferragamo, Prada and Ralph Lauren becoming globally iconic in importance. Beyond the iconic fashion brands, the local fashion brands launched in local markets are closely tied to national identity and cultural milieu and often reflect societal attitudes on particular issues. Iconic designer fashion brands like Sun Goddess, Clive Rundle and Thula Sindi in South Africa are now household names and continue to evolve responding to cultural and societal changes. Lesser-known fashion brands which are a visible market segment have also become part of the clothing landscape in South Africa.

The modern version of fashion began in the 19th century when Charles Frederick Worth, an English born and French based designer, started sewing names into the garments he produced (Mengi, 2015). With the advent of the industrial revolution, garment manufacturing grew to take in a range of different routes and became a popular industry in the UK and US. The industry has continued to evolve and expanded globally. Fashion has evolved from a contained and craft-based model to an industry which is globally produced, distributed, and consumed (Mengi, 2015:7). Mengi (2015: 7) provides a distinction between clothing and fashion while acknowledging that the two terms tend to be used synonymously and states that, 'clothing can be regarded as a basic need to be covered up' while 'fashion can be evaluated as an excess luxuriance'. There is a tendency to use the terms fashion and clothing interchangeably although as Mengi (2015:6) suggests the luxury element may distinguish fashion from clothing. A number of key cities have emerged as fashion centres and have driven most of the innovations in the global fashion industry including New York, London, Milan, Paris, and Berlin. Within Africa, South Africa has emerged as a key fashion node with Johannesburg, Durban and Cape Town as key centres of innovation and design excellence.

The global apparel/fashion industry comprises 2% of the world's gross domestic product and employs 33 million textile workers, an increase from 19.7 million during the past 25 years

(Wang, et al. 2019, Teibel, 2019). A 2018 report by the global consulting firm Mckinsey presents key trends on the fashion industry (Mckinsey, 2018). A change is occurring in the centres of power and organisation of the global fashion industry. The main sources of growth are now emerging market countries across Asia Pacific, Latin America, and other regions. The long-established key centres of the fashion industry of Europe and North America remain pivotal pillars of the industry but are certainly now facing competition from other regions. Asia can be described as the rising star of the industry as Asian fashion players cement their power on the global fashion stage. A noticeable trend that is likely to keep increasing in importance is that personalisation and artificial intelligence will play a key role in the fashion industry going forward (Mckinsey, 2018).

The impact of the digital revolution on the fashion industry is apparent and this has led to more consumers choosing to purchase their clothing online and a move away from instore shopping. Online shopping has seen rising popularity in the COVID-19 era as social distancing and lockdown restrictions make it safer to buy online. What impact will the COVID- 19 pandemic have on the larger clothing and fashion industry? Early indications show that the fashion industry is in distress as consumers stay indoors and opportunities for recreation and leisure pursuits dwindle.

The movement away from the traditional centres of the fashion industry in Paris, Milan, New York and other fashion capitals and the rise of the east has already changed the fashion industry and will undoubtedly remain an issue that will challenge the viability of the South African and broader African fashion industry. The fashion industry is in a state of flux as new centres are defined and old centres have to find a new positioning and are redefined.

African fashion is no longer just a periphery part of a global fashion industry but is seen more and more as being a sizeable and significant industry (SA Fashion Week Handbook, 2019). Jennings (2015:44) describes African fashion as the 'most exciting emerging fashion sector in the world drawing attention to the rich fashion history of the continent which has developed over centuries. It is estimated that the African fashion industry is worth 31 billion dollars (Toesland, 2016). Several countries are key to the fashion industry on the continent and across all regions developments have been noted, signalling an industry that is a key part of Africa's creative economy. The cultural influences of various regions are noted in design across the continent aided by migration and mobility advances. Within Southern Africa there has been a design ethos that strongly reflects the region, but influences are also apparent from the more northerly parts of the continent. East and West Africa are certainly regions that have asserted more evident influence in the design aesthetic of the Southern African fashion industry. It is very noticeable on the streets of African cities and certainly in South Africa that West Africa is a key influencer of fashion trends on the continent and an interesting dynamic is taking place as traditional fashion styles are incorporating modern aesthetics. Countries like Nigeria and others in the northern half of the continent are bringing fresh inspiration to the global fashion industry and infusing a different dynamic into the Southern African region. Nigerian cultural fashion trends are popular across the continent and have been popularised by the migration of Nigerians who are in almost every country.

The rising influence of Nigeria as a fashion focused region has put it into competition with Johannesburg as the pivotal fashion city on the continent driving trends and cascading change. Jennings (2015) asserts that Nigeria is a key contender for the key fashion capital in Africa competing with Johannesburg proposing that the style conscious nature of Nigerians and the pool of Nigerian designers with influence on the global fashion stage has contributed to its role in the continent's fashion sector. Lagos is a key fashion capital and Nigerian influence on South African design is quite evident on the streets of Johannesburg. In East Africa, Kenya is focused on the fashion industry and Kenyan fashion is seen more and more as a competitive sector closely tied to the tourism sector (Gatawa, 2008). Naomi

Campbell, a leading American supermodel, was selected as the tourism ambassador for Brand Kenya which though somewhat controversial has highlighted the influence of the global fashion industry and global fashion icons on the continent (BBC, 2021). An interesting dynamic identified by Langevang (2016) highlights the global ambitions of African designers who are more and more uncomfortable with being called African designers or referring to their designs as African fashion but are reaching for a design aesthetic that has global appeal.

Sustainable fashion has arrived in South Africa with the rise and promotion of sustainability on the continent increasingly apparent driven by the need to safeguard the earth's resources (SA Fashion Week Handbook, 2019). The creative dynamism and innovation in the fashion industry is evident across the African continent and even in the smaller countries in Africa and has led to a rising positioning of the continent as a recognisable fashion region with influence and an emerging clout. While there has been growing interest in sustainability, there remains limited research into how sustainability is being adopted in the African and South African fashion industry and research is skewed to the more developed regions even when the sustainability debate is increasingly a global fashion industry debate.

In Southern Africa, Johannesburg and indeed South Africa is leading the charge in fashion dynamism (Gatawa, 2008; Rogerson, 2006, Jennings, 2015, Aziz et al, 2019). Interestingly, Johannesburg with the proliferation of designers and multiplicity of brands is becoming a centre of power in the continental fashion paradigm and it is quite evident that fashion is a key element in the city's positioning. The cosmopolitan nature of the city and its immigrant dynamic has resulted in a fashion industry that draws inspiration from across Africa and is also infused with western influences creating a very dynamic fashion aesthetic in the city, characterised by bold, daring, sometimes unexpected and often alluringly different fashion trends. Cape Town which has been the Design Capital of South Africa is also a city which sets fashion trends in a very bold way.

The SA Fashion Week Handbook paints a picture of a fashion industry with incredible dynamism and with diverse designers from different regions of the country and with Cape Town and Johannesburg leading the way in the numbers of emerging designers (SA Fashion Week Handbook, 2019). There are over 200 designers listed in the handbook working across a range of fashion and accessories design. The cosmopolitan nature of South Africa has also introduced western influences on the local fashion industry. Illustrating the dynamism in the industry, many other developments have taken place in the South African fashion industry such as the rising importance of events and the proliferation of fashion-related events in key cities in South Africa including Johannesburg. Fashion Week events are now a key part of the creative cultural calendar, and the Johannesburg Fashion District has been earmarked as the fashion capital of Johannesburg (Rogerson, 2004; Gatawa 2008; Johannesburg Development Agency, 2019). Jennings (2015) notes that in terms of media, South Africa's fashion industry is well developed. The impact of the fashion industry on the tourism industry has also been a focus of research and policy direction. The potential of the tourism industry to drive growth in the fashion industry was highlighted as one of the key objectives of the development of the Johannesburg Fashion District as a viable site for tourists (Rogerson, 2006; Gatawa, 2008).

The South African fashion industry while exhibiting a creative and innovative focus has also been plagued by issues of viability. The local fashion industry and specifically small and gatawamedium sized designers of fashion garments have faced viability issues and there are some very definite challenges that need to be addressed to drive economic sustainability in the sector (Gatawa, 2008). Some of the more pressing challenges relate to the fragmentation of the industry and the inability of the industry to speak with one voice as well as the limited financial resources available to designers to grow and develop their businesses as well as low profitability and problems relating to market access (Gatawa, 2008). The recent viability challenges at leading clothing retailers in South Africa reflect a clothing industry that is struggling, perhaps influenced by economic pressures but also as a result of changing consumer behaviour and the rise of online shopping and latterly, the COVID- 19 pandemic. More and more fashion businesses have to find enticing ways to lure customers and create interest as old ways of presenting and merchandising clothes are no longer as effective as they used to be. Globalisation and the connectedness of countries has opened up a whole new paradigm in clothing purchasing options that threaten the 'brick and mortar' fashion and clothing stores in very evident ways. Lowering consumer disposable incomes have undoubtedly put pressure on an industry which in the last few years has faced increasing competition from China in particular. While the focus of this study is skewed towards small designer fashion stores and not large clothing retailers there is an evident shift in consumer purchasing behaviour in favour of cheaper and more affordable clothing and away from more expensive and durable clothing.

2.5 Fashion Districts, Green Clusters, and the Green Economy

Figure 2.1: The Johannesburg Fashion District, Source: Johannesburg Development Agency

In response to the decline of the fashion and textile industries in Johannesburg in the 1990s, urban planners led by the Johannesburg Development Agency and developers worked with key fashion and creative industry stakeholders, small-scale fashion designers and the remaining fashion players still located in an area within the Johannesburg CBD that had been traditionally associated with the fashion industry to develop a precinct specifically focused on the fashion industry which is the Johannesburg Fashion District. The Johannesburg Fashion District has emerged as a recognisable fashion focused precinct within the inner city. There are over 1000 fashion related businesses in the district (Johannesburg Development Agency, 2019). The district's fashion focus and its demarcated location within the Johannesburg CBD could become a pilot site for the rollout of sustainable fashion practices that could then be cascaded to other parts of Johannesburg and the rest of South Africa. Eco fashion initiatives introduced in the district can become an example of sustainability practices that can be cascaded to other regions of Johannesburg and beyond. However, as is the case in the broader clothing industry, in South Africa there are very real viability challenges gnawing at the industry. Whether environmental sustainability can be achieved in such a scenario is not clear, but this study should certainly bring forward some pertinent debates around this very critical area of study. As the threat of climate change intensifies, the need to develop industry specific guidelines on environmental sustainability and product development that prioritises environmental aspects is key.

Fashion districts have become popular worldwide as centres of design excellence and as creative and marketing hubs/clusters for the fashion industry. The conglomeration or cluster formation of businesses with similar focus creates numerous opportunities for synergies and business growth (Porter, 2000). Clusters have a long history and go back to the seminal work of Harvard Economist Michael Porter (Porter, 2000). Clusters are an important way through which location-based synergies are realised. Studies have shown that there is significant evidence of the positive impact of clusters on entrepreneurship. Clusters are geographic concentrations of interconnected companies and institutions in a field. Clusters encompass an array of linked industries and other entities important to competition. Clusters promote both competition and cooperation. In a cluster there is intense competition for customers but there is also cooperation. Clusters beyond the geographic concentration of similar companies may also have positive impacts on the environment.

The rise of green clusters is a key development in innovation, regional and industrial restructuring globally (Cooke, 2015). While green clusters are relatively new, limited and little is known about firm competitiveness and regional development within the clusters and green clusters have been identified as being important to new path development and physical proximity. Clusters are a progressively important policy tool for economic development and catalyse growth although it has also been suggested that they may promote the overreliance of localities on particular industries, especially in the event of an economic downturn (Derlukiewicz, 2019). Green clusters may offer clues to the likely impact of fashion districts on the spread of sustainable fashion trends and the ability of the industry to encourage the spread of good environmental practices.

Is it possible that the practices of one designer in a fashion district who may be environmentally focused will cascade to other designers? Can an environmentally focused outlook be learnt from observing the practices of another designer? Can a revolution in fashion sustainability in the fashion industry start in the Johannesburg fashion district and become the blueprint for other creative industries in South Africa to implement sustainability initiatives? Could a best practice blueprint for sustainability in the fashion industry be developed? Clusters are geographic concentrations of firms in similar lines of work or industrial conglomerations and have positive and negative impacts and perhaps one positive impact will be the sharing of good or best practice initiatives like environmental sustainability programs.

2.6 Unpacking environmental sustainability in the fashion industry

There is noticeable interest in green products in the fashion industry and large-scale fashion retailers such as H&M and Zara have adopted sustainable business models (Todeschini et al. 2017). Within the fashion industry several changes have taken place and it remains a very cyclical and ground-breaking industry characterised by the emergence of new trends seasonally. Concepts such as the fast fashion and slow fashion dichotomy as well as sustainable supply chain management (SSCM), corporate environmental sustainability (CES) and the crucial role of logistics is shaping the direction of the industry in an era of green practices and a move to sustainable methods of production.

Product lifetimes and obsolescence have become key considerations in the fashion industry and several strategies have been put in place to enable slower cycles of product replacement as fast fashion threatens the sustainability of the fashion industry (Maldini et al., 2019). A trend that has emerged and seems to underpin a lot of what is happening in the fashion industry as well as influencing the environmental and social reputation of the industry is the concept of fast fashion and slow fashion (Turker & Altuntas, 2014; Henninger et al., 2015; Mehrjoo & Pasek, 2017). Fast fashion is a popular type of fashion that is sold at affordable prices and is trendsetting, easily replaceable and changes seasonally, a disposable and seasonally changing type of fashion (Pookulangara & Shepherd, 2013; Shen et al., 2017). Fast fashion has its roots in Europe and requires that fashion supply chains be very responsive and quickly produce products that satisfy consumer needs.

Cierniene & Vienadiene (2014) outline the structure of the global fashion industry and highlight the role of the agility of fashion supply chains as the industry now focuses more on fast fashion. The organisation of the fashion industry globally comprises clothing often designed in one country, manufactured in another country, and sold in another country. The emergence of fast fashion is a strategic business decision aimed at reducing the lead times for fashion to get into the stores. The buying cycle is an important part of this strategy and process and in a fast fashion strategy tend to be reduced. Fast fashion was developed in Europe focusing on teenage and young adult women who are price conscious and trend conscious and frequently buy clothes. The long buying cycles became inappropriate for the demands of the fashion industry. The agility of the supply chain plays a crucial role in the fast fashion industry.

Fast fashion has been a contributor to the rise in fashion waste. As retailers compete aggressively for markets for fast fashion garments there has been a drop-in cost and a poor commitment to social and environmental standards. Fast fashion has been very appealing to the consumer because it is inexpensive and comprises styles worn on the catwalk in luxury fashion shows in the leading fashion capitals of Milan, Paris, New York, and London.

Cimatti et al. (2017) states emphatically that fast fashion clearly exemplifies unsustainability as there is an ongoing focus on renewing clothing based on the prevailing trends, resulting in a culture that fuels unsustainability. The selection of clothing and accessories by consumers in a fast fashion age are influenced by their environment and the culture they aspire to. Media has played a role in fuelling this insatiable desire for new clothing. The production and selling cycles of garments in the fashion industry has changed dramatically. The turnaround time from catwalk to consumer which was previously six months has been greatly reduced to just a few weeks. In a fascinating description of the intricacies of the production cycle of fast fashion companies, Cimatti et al. (2017: 394) describes how fast fashion companies work.

> Fast fashion companies thrive on fast cycles: rapid prototyping, small batches, combined with large variety, more efficient transportation and delivery, and merchandise that is presented ‵′floor ready″ on hangers with price tags already attached. Technology advances such as tracking sales with electronic sales and linking these data to supplier factories with flexible production schedules has now made it possible to restock a rail with popular items as demand requires; and computer-aided design interfaced with just-in -time manufacturing methods has enabled a design sketch to be turned into a finished product in as little as three weeks.

In juxtaposition to the rise and almost takeover of fast fashion is the slow fashion movement which is the antithesis of the fast fashion movement. The emphasis in the slow fashion movement is to create longer lasting garments with a quality focus and with less likelihood of being replaced seasonally reducing waste and promoting a culture that embraces garment longevity.

Environmental awareness and environmental conservation are key to policy agendas and the defining of country and city priorities in the 21st century (UNEP, 2018). The United Nations Environment Programme drew attention to the magnitude of the challenges facing the planet in 2021 and defined the triple environmental challenges facing the planet as pollution, declining biodiversity, and climate change (UN NEWS, 2021). The multiplicity of challenges facing the environment in different localities certainly go beyond the main three identified by the United Nations Environment Programme but what is evident is that the planet is facing pressure and is being destroyed by human activities of all kinds. The manufacture of fashion apparel has serious negative consequences on the environment posing hazards to flora and fauna in an evident way (Nerurkar, 2019). From the raw material stage to production and final disposal and waste management the negative impacts on the environment are significant (Nerurkar, 2019; Shafie et al., 2021). The rise of internationally recognised green cities such as Amsterdam and Barcelona reflect the move to environmentally focused planning and policy in many countries and a shift away from a scant regard for environmental concerns is evident (UNEP, 2018). Research focused on environment related issues has continued to receive international acclaim particularly relating to industries that are seen to have a pivotal role in development and economic policy.

The emergence of eco fashion globally and in SA signals the importance of the environment and the emergence of eco-friendly brands across other product categories is in line with this development. While eco fashion has been in existence for many years, it has only become somewhat visible in South Africa recently. Ecologically friendly fashion brands are now available in South African stores and have become a more visible fashion brand in developed markets.

Climate change and global warming are key threats to humanity and sustainability and widespread media coverage of climate change threats have brought environmental priorities to the apex of global policy priorities. The rise of eco fashion globally and the launch of eco collections in South Africa by leading designers speaks of the importance ascribed to environmental issues globally and the ongoing push for more accountability for environmental impacts in all industries. Environmental sustainability in the fashion industry is no longer a peripheral consideration but has become a pivotal part of business survival and is closely linked to reputation management, corporate social responsibility, and integrity. The scandals that have rocked the fashion industry relating to environmental concerns have put the ability of the fashion industry to operate sustainably in question (Caniato et al., 2012; Moretto et al., 2018). Fellows (2019) describes and laments the environmental toll of the fast fashion industry with its bottom-line approach that disregards the negative impact of fast fashion on the environment. While there has been increasing focus on the challenges relating to sustainability in the fashion industry, there has been no clear articulation of a clear pathway or map to achieve sustainability from a supply chain perspective (Moretto et al., 2018). Rising levels of competition in various industries and the ongoing challenges in the environmental sector relating to global warming and climate change as well as other environmental issues have added momentum to the need to have effective environmental programs across all industries and for the development of eco-friendly products.

2.7 Sustainability, sustainable development, and sustainable fashion : Forging new and innovative pathways

Sustainability issues have become important across myriad industries and while there have also been paramount in the fashion industry, there remains a lack of a structured analysis (Caniato et al., 2012). The launch of products aimed at safeguarding and preserving the environment signals an ongoing move to a focus on product attributes that incorporate good environmental practices. While there is a very definite focus on the green economy and green products across the globe as well as in the less developed regions, particular difficulties impeding the widespread adoption of these products remain. Green products or environmentally friendly products have risen in prominence in many regions of the globe but there remains a cloud of uncertainty and confusion on what constitutes a green product and definitional issues continue to plague the industry with several different terms used to describe what are products focused on environmental protection (Cervellon and Carey, 2011). Terms like organic, green, sustainability, eco-friendly, eco conscious etc have all been used to describe products incorporating environmentally friendly practices (Cervellon and Carey, 2011).

The green economy is an important element of economic policy in the last decade as issues of sustainability become key considerations to address the challenges of the 21st century (UNEP, 2018). Green products are becoming a key element of product portfolios across disparate industries and there has also been a spike in research focusing on green product innovation (Brecard, 2009, Dangelico & Pujari, 2010). Green product innovation is a multi-dimensional process incorporating three types of environmental focus, material, energy, and pollution (Dangelico and Pujari, 2010). Internationally renowned brands such as the French footwear brand *Veja* and the American clothing company *Patagonia* as well as mainstream brands such as *H&M* have launched eco collections. Other well-known brands with eco collections include the UK brand *Stella McCartney* and *Noir* the Danish luxury fashion brand. An issue that has plagued the rise of eco fashion and all green products is the lack of clarity on what exactly constitutes a green or eco product. It has been argued that consumers are sometimes misled and are often confused about these terms (Cervellon & Carey, 2011).

Garment making has become increasingly versatile in recent decades driven by the variety and novelty of the types of fabrics available. Textiles used in garment construction are generally divided into two types, natural and man-made fabrics (Neal, 1976) and the rise of organic fabrics has added further variety to the textile landscape. Natural fabrics like wool and silk are made of animal fibres or vegetable fibres like cotton and linen. Organic fibres are made with strict guidelines of manufacture without the use of harmful pesticides or chemicals (Spector, 2012). Man-made fabrics can be regenerated from plant fibres such as rayon or from chemical processes such as nylon (Neal, 1976).

NATURAL FABRICS	MAN MADE FABRICS	ORGANIC FABRICS
WOOL	RAYON	HEMP
SILK	NYLON	BAMBOO
COTTON	TWEED	TENCELL
LINEN	JERSEY	SOY CASHMERE

Table 2.1: Types of Fabrics in the Fashion Industry, Source: Neal (1976) & Spector (2012)

The fabrics or textiles used for garment construction have a key influence on environmental impacts and the manner in which the textiles are produced plays a key role in the environmental impacts of textiles (Carvalho & Santos, 2016). The textiles industry has one of the most complicated and longest chains in manufacturing with high pollution and adverse environmental impacts (Carvalho & Santos, 2016). Synthetic fibres comprise 61.3% of all fibres created by the textile industry according to a study carried out in 2011 (Teibel, 2019). Synthetic fibres are made from petroleum oil which is a non-renewable resource and there is high energy consumption in extracting the oil and transforming them into polymers in chemical processes that produce a lot of greenhouse gases (Teibel, 2019). Examples of synthetic fibres include nylon and polyester. Nylon is detrimental to the environment producing nitrous oxide in its production and is very difficult to recycle and polyester production emits dangerous organic compounds harmful to human health (Teibel, 2019).

Textile dyes are detrimental to human health and the environment, impacting the scenic beauty of water bodies, polluting water bodies with untreated effluents harmful to aquatic life and may contain carcinogenic agents and other toxins which may be dangerous for human health (Lellis et al., 2019).The dyes used in fashion manufacturing are part of a huge dyes industry and there is a call for the use of natural dyes in the fashion industry (Carvalho & Santos, 2016). Natural dyes are more environmentally friendly compared to synthetic dyes and can be more biodegradable (Yusuf et al., 2012). Henna (Lawsonia Inermis) is a popular natural dye made from a shrub found in India and other regions of Asia and has widespread uses (Yusuf et al., 2012).

Colour is a pivotal component of fashion’s attractiveness to consumers and the textiles and fashion industry spend huge amounts of money in the search for the perfect colour (Carvalho & Santos, 2016). Effluents from dye development pose a serious environmental hazard and are a key environmental concern (Carvalho & Santos, 2016). Textile selection and the vast amounts of fabrics used in garment manufacturing are an important consideration in the fashion industry. Global textile consumption is more than 30 million tons which causes serious social and environmental impacts within the supply chain (Shen, 2014).

Technology has been an enabler and a catalyst of the transition to sustainability in the fashion industry (Scaturro, 2008). The adoption of green technology and biotechnology in supply chains has played a role in more sustainable supply chains across industries. An examination by Shen and Li (2019) drew attention to key principles and benefits of the adoption of green technology also known as clean technology in the supply chain. Green technology promotes production efficiencies and reduces unit production costs and incentive schemes can play a part in better managing and encouraging sustainability. To encourage the adoption of green technology and deter the use of unsustainable methods of production, schemes such as environmental taxes, green technology investment subsidies and penalties for pollution can be introduced. The adoption of green technology is playing a role in aiding greenness in the supply chain also reducing unit production costs. A model developed by Shen & Li (2019) showed that optimal greenness levels were achieved as environmental taxes increased reflecting a direct correlation between the two variables and that environmental taxes could be an effective tool to increase the adoption of clean technology. The study also found that retail competition also influences the adoption of green technology.

Figure 2.2 Green technology in a fashion manufacturing plant, Source : The Business of Fashion

The fashion industry has a somewhat tainted reputation relating to its impact on the environment and as the urgency to address environmental concerns heightens, the industry is scrutinised (Caniato et al., 2012; Shen, 2014; Shen & Li, 2015). The textile sector is a key anthropogenic activity that contributes to environmental degradation (Lellis et al., 2019). The issue of sustainability is topical because of recent sustainability scandals of the fashion industry, including the mistreatment of animals, poor worker conditions and creating eco unfriendly collections (Turker & Atluntas, 2014). Wang et al. (2019) states emphatically that the fashion industry has contributed to unsustainable environmental impacts, generated a lot of waste, led to the exploitation of workers and is a high user of resources. The cotton industry is pinpointed as a major cause for concern regarding its environmental impact as it is a very water intensive production textile and certification schemes in the cotton industry in Africa, including sub-Saharan Africa have become popular with varying impacts (Partzsch & Kemper, 2019; Partzsch, et al., 2019).

Sustainable supply chain management (SSCM) has garnered increasing attention from industry and scholars Turker & Altuntas, 2014). The main intervention in promoting environmental sustainability in the fashion industry is the design and optimisation of a green supply chain and a sustainable fashion supply chain is an important strategy for many fashion companies (Shen, 2014).

South Africa has its own unique set of environmental challenges. Water management and conservation is a key element of environmental sustainability in South Africa. Water plays a critical part in our daily lives and is an invaluable resource on the earth (Lellis et al., 2019). South Africa's water situation requires that all industries adopt a water friendly manufacturing and production ethos. The serious water crisis in Cape Town a few years ago and in other parts of the country highlighted just how precarious water can be as a resource and showed that a zero-water scenario is really not just an exaggeration but can actually happen. Issues around waste management and refuse collection are concerning, particularly in more crowded precincts within the inner city such as Hillbrow and much of the Johannesburg CBD. To cite an area close to the University of the Witwatersrand, the Braamfontein precinct, which has grown rapidly with a focus on student housing and retail and has also started to develop problems around waste management and odour pollution, exacerbated by crowding in the relatively small precinct. Burst pipes often visible highlight the challenges of environmental protection in crowded city spaces. Poor waste management has health, social and other societal risks.

The Johannesburg Fashion District which is included in the study and has been earmarked as the centre of the fashion industry in Johannesburg has not really been as successful as had been hoped in attracting fashion designers. The Fashion District's location in the inner city certainly raises environmental factors that are a unique aspect of city developments and more specifically large cities in the developing world. Lockdown restrictions prevented interviews with fashion designers in the district but a tour through the district revealed a district that has taken on a very distinct profile with African and Asian immigrants taking up space in the district and a very pan African flavour.

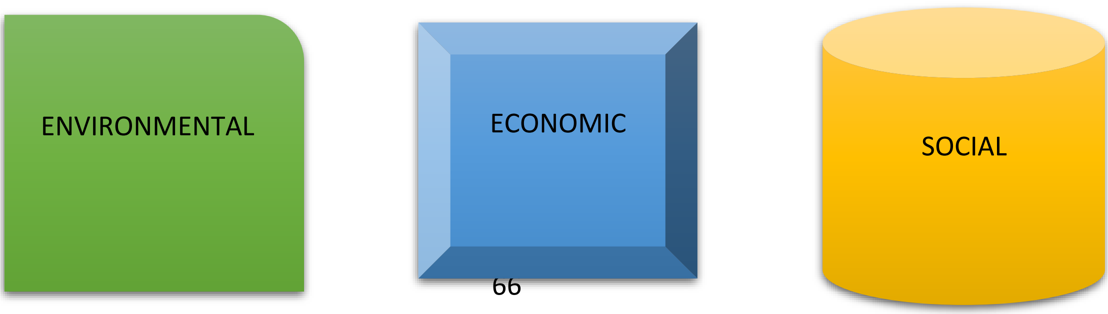
A pivotal issue facing any type of industry in South Africa and one of the three pillars of sustainability is social sustainability. The persisting inequalities between the rich and the poor in South Africa and particularly as economic growth slows down have resulted in a widening poverty gap and cannot be ignored in any sustainability program designed in a South African context. The fashion industry is a relatively small component of the South African economy but the low barriers to entry to the industry for entrepreneurs have made it a viable choice for aspiring entrepreneurs and for income generation in a country where poverty and unemployment remain a challenge. Sustainability initiatives in South Africa must engage with social justice issues and any environmental program must incorporate aspects relating to addressing poverty. The precarious and potentially explosive nature of social justice and inequality issues have become more visible during this COVID- 19 pandemic heightened by the *Black Lives Matter* protests sparked by the death of George Floyd in June 2020 in the United States which spread throughout the globe. The protests have brought to the world's attention the simmering nature of the race issue in America and elsewhere in the globe and put pressure on many sectors and industries to engage with historical legacies of racism and poverty. The fashion industry, by its very organisation, depends on poor countries using cheap labour in often inhumane working conditions and rumours of racist actions in the treatment of models of colour and in other ways have swirled around the industry for years. The fashion industry has remained silent on the protests refusing to publicly support the *Black Lives Matter* movement eliciting criticism from celebrities such as Victoria Beckham, a self-made fashion mogul married to former football star David Beckham and Joan Smalls, a leading supermodel (Marie Claire, 2020). The environmental justice movement has its roots in America and the Civil Rights movement and focuses on ensuring that environmental inequality is addressed and that the poor do not take on the lion's share of environmental hazards (Gonzalez, 2019; Schlosberg, 2013). A concept that is closely aligned to the environmental justice paradigm is political ecology.

Environmental justice cannot also be separated from ecological modernisation which plays a part in environmental management and has become a dominant paradigm proposing that there are economic benefits to be derived from sound environmental practices (Mol, 2000).

Sustainability is an important element of business strategy for companies across a range of diverse industries from fast moving consumer goods companies (FMCG) to financial services firms to even small owner managed companies. The rationale for adopting sustainability may be largely focused on profitability concerns or it may just be to keep abreast of the latest business strategies and be more reputational or marketing focused (Alexander, 2007). The greatest proponents of sustainability in the fashion industry have come from Europe where there are a considerable number of consumers that are sustainability conscious (Caniato et al., 2012; Cervellon and Carey, 2011; Shen, 2014; Shen & Li, 2015). A study based in Ethiopia investigated the promotion of certification initiatives in the Ethiopian fashion industry and the call to boycott ''dirty fashion' and the power of certification to effect positive change in the fashion industry (Partzsch & Kemper, 2019).

Sustainable Development has a long history and is somewhat of a buzzword, frequently used but rarely understood clearly (Redclift, 2005). The term has had a rather unclear meaning and various definitions have been put forward over the years. Redclift (2005) explains the trajectory of the term sustainable development from its beginnings in the World Conservation Strategy (WCS) published by the World Conservation Union (IUCN). Turning the tide and proffering an alternative definition to sustainable development which gained wide acceptance in 1987 a report was published "*Our Common Future*", also known as the Brundtland Report. The term sustainable development has also gained greater recognition since the United Nations Conference on Environment and Development (UNCED) held in Rio de Janeiro in June 1992. The term has been widely used across different industries in government, non-governmental organisations, civil service, development agencies and so many more sectors. The Brundtland Report has a twin focus on social justice and economic health and brought a fresh dimension especially for those engaged in the fight against poverty. No longer was development measured only by quantifiable economic indicators such as GDP etc.

The concept of sustainable development was ground-breaking, but it drew upon similar themes focusing on helping others, safeguarding resources and with a future focus and rooted in the natural environment.(Redclift, 2005). Sustainability consists of a three-pronged pillar or a triple bottom line, environmental, economic, and social sustainability and there has been ongoing revisions of the various components and drivers of sustainability which can be incorporated in an area of the organisation (Young & Dhanda, 2013).



Sustainability is a concept steeped in controversy (Beckerman, 1995; Ayres, 2008; Ang & Van Passel, 2010; Davies, 2013) and while many authors have posited various definitions it remains a vague and unclearly defined concept. Over the years a number of conferences and initiatives have been aimed at articulating a clearer and more succinct definition of the term sustainable development but there is still no consensus on one definition (Glavik & Lukman, 2007). The proliferation of terms relating to sustainability are increasing as rapidly as the awareness levels of the importance of sustainability (Glavik & Lukman, 2007). The most adopted definition of sustainable development proposed by the Brundtland report in 1987 defines sustainable development as development which meets the needs of the present generation but considers the needs of future generations (Kuhlman & Ferrington, 2010). The Brundtland report highlights the ongoing mismatch between the quest for the seminal definition of sustainable development remains the most frequently cited it may be rather difficult to consider the needs of future generations in countries or localities where the needs of the present generation overshadow any future considerations of future generations. The unclear definition of sustainability and the proliferation of terms relating to sustainability is problematic for any attempt to implement a sustainability initiative. The focus of this thesis is on environmental sustainability. Any sustainability program requires a sound and very practical understanding of what sustainability is. The United Nations sustainable development goals are a key part of the sustainability discourse and are aimed at achieving a sustainable future for all. There are 17 goals in the framework which provide targets for the world to work towards by 2030 and there are a total of 169 targets (UNEP, 2019) .

The concept of eco fashion sounds great in principle but the very first step in designing a sustainability initiative is a consensus on what the key focus areas for an effective and implementable sustainability program should be. A key question that arises is regarding which areas should be prioritised in an environmental sustainability program for the fashion industry. Traditionally, the focus of sustainability programs in the fashion industry have been the supply chain (Turker & Atlantas, 2014; Shen 2014; Shen and Li, 2015). In principle, that makes sense but is sustainability a concept that should focus largely on procurement, production, distribution, and retailing? Are there other factors in the organisation that can impact environmental sustainability outside the supply chain like cultural factors or organisational hierarchy?

Sustainability reporting in companies has become a tool that is used to streamline business operations towards sustainability and sustainability assessment is a key part of sustainability reporting. Sustainability assessment as explained by Pope et al. (2004) is an important tool to help in the shift towards sustainability although it is an evolving concept. The definition of sustainability assessment proposed by Pope et al. (2004 : 2) sheds lights on the way a sustainability assessment is conducted.

> Sustainability assessment is often described as a process by which the implication of an initiative on sustainability are evaluated, where the initiative can be a proposed or existing plan, policy, programme, project, piece of legislation or a current practice or activity.

Pope et al.(2004) further suggests that in the literature the sustainability assessment is often described as environmental impact assessment or strategic environment assessment and expanded to incorporate social and economic considerations to focus on the triple bottom line towards sustainability. The question of what sustainability actually means is key when conducting or designing a sustainability assessment. While many corporate sustainability strategies have arisen, and many companies investigate sustainable management and publish reports, their focus may be unclear. The term sustainability has often had a veil of confusion around it with meanings ascribed differently. Pope et al.(2014)

points out that sustainability is a concept that can hard to define and often has a fuzzy meaning that can be difficult to articulate or operationalise. Greco & De Cock (2021:55) echo this view highlighting the fuzziness of the debates around sustainability which give rise to what they call an 'argumentative polylogue' with different actors advancing their views in different venues from social media sites to official documents.

The sustainability debates dealing with the broader concepts of sustainability provide a distinction between weak and strong sustainability (Davies, 2013). The concept of weak and strong sustainability adds an interesting dimension to the debates around sustainability and offers some interesting propositions relating to the importance of natural and manufactured capital in the sustainability debates (Beckerman, 1995). Weak sustainability proposes that natural capital and manufactured capital are substitutable and that there is no difference between the kinds of wellbeing they generate. Strong sustainability on the other hand disputes this assertion proposing that natural capital is not composed of resources only but is a mix of biotic and abiotic elements interacting in a dynamic and evolving system (Pelence et al., 2015).

Procurement is one of the most important functions which influences supply chain sustainability because procurement does not affect only the supply chain output but also changes the supply chain structure. The difficulty sometimes in implementing procurement strategies is that there exists a conflict between supply chain profit goals and sustainability goals. Furthermore, environmental sustainability in the fashion industry is a somewhat evolving and undeveloped concept with a murky definition (Cervellon & Carey, 2011; Teibel, 2019).

Eco fashion is a still somewhat new addition to the fashion industry and as yet remains limited in its adoption globally. Are we to conclude that indeed eco fashion is likely to be adopted tentatively based on its niche nature? A concept which is called a niche concept is limited in its adoption and this perhaps returns to the central focus of this thesis, can eco fashion become a widely adopted concept with environmental benefits? Eco fashion while still very limited in its adoption particularly in the Global South has a long history. Have there been instances where a seemingly narrowly focused product becomes a mainstream or very popular product?

Kotler (1991) asserts that there are predictable stages for products as they move from initial launch to decline. During the initial launch stages of a product sales are very low and consumer awareness is limited and gradually sales and awareness rises to a peak and then onto a decline stage. Early adopters are the first to try out new products and laggards are the last to try and while the stages can follow a predictable stage by stage cycle, they may also follow a different pattern missing stages or repeating stages. These stages may occur multiple times as products are revamped and reintroduced into the market. Eco fashion is not a new product and was launched more than 20 years ago but has gained increasing awareness suggesting a growth phase after a slow adoption cycle and perhaps in the future might become a mainstream product. It is difficult to accurately forecast the stages of development a product will follow as some products may take longer to reach their peak while others will remain in a slow growth phase indefinitely and many other different variations. The five stages outlined by Kotler (1991) are a useful comparison and can bring some light to a product's trajectory.

Certification in the fashion industry is a key theme in the literature although the multiplicity of possible certification systems can lead to confusion and a lack of standardisation. The ISO series of quality standards has been widely adopted but there are others as well (International Standards Organisation, 2019). Environmental management systems such as ISO 14000 have often been how companies have sought to incorporate sustainability in various industries (International Standards Organisation, 2019). ISO 14000 is a set of standards, guides and technical reports providing practical tools for companies and organisations across all industries to manage their environmental responsibilities. The ISO series is currently being revised and the ISO 14000 and ISO 9000 series are being aligned for better efficacy in environmental and quality management (International Standards Organisation, 2019). The aim is to improve the way in which these systems work. The efficacy of environmental management systems to promote environmental sustainability is hotly debated as their impact is far from clear.

The current revision of the ISO 14000 and ISO 9000 standards also pinpoint a key element of devising an effective environmental management program. The environment by its very nature is unpredictable and environmental hazards can quite quickly appear and disappear and therefore any environmental management system needs to be very adaptable and quite fluid. Production of fashion garments is usually quite a standardised process either in a sophisticated factory or can be quite basic using sewing machines and carrying out most of the garment construction by hand. These two methods of production pose different environmental conservation challenges. Sometimes small-scale designers outsource bulk production of their garments to large factories introducing another dimension of environmental hazards and managing sustainability.

2.8 Envisioning sustainable fashion: key definitions and types of sustainable fashion

It has been proposed that the sustainability of a garment is determined at the design stage (Karell and Niinimaki, 2020) but designers have pushed back against this accusation, suggesting that the entire sector needs to take responsibility for the environmental impact of the industry (European Union, 2012, cited in Moorhouse, 2020). The specific contribution of the design phase of garment construction towards sustainability is not easily quantifiable (Karell and Niinimaki, 2020) although there has been ongoing research to try and understand how designers can aid sustainability. Sustainability has risen to a key strategic policy priority in the global fashion industry against the backdrop of rising concerns regarding anthropogenic impacts on the environment. In South Africa, the discourses around sustainability are becoming more visible and there is a call to incorporate sustainability principles in the fashion industry. South African fashion designers operating in a largely boutique style and in characteristically small stores located largely in urban centres around the country have become a significant part of the economic landscape of the country. The fashion design sector in South Africa has had rising visibility and influence and the low barriers of entry or ease of entry for new entrants seeking to become fashion designers has been catalytic to entrepreneurial ventures and contributed to employment creation creating a fashion design sector with rising prominence and impact. The beauty of the fashion design business is that in many cases it is possible for the designer to initially work from home and with a very lean cost structure whilst building their brand and this makes it easy for aspiring designers to start a fashion design business in South Africa. The number of fashion design schools in South Africa has also contributed to the growth of the fashion design sector as aspiring designers after completing a course of study in fashion will in many cases start their own fashion brand. Activities and business models in this business segment are a key consideration in policy formulation and are increasingly scrutinized because of the contribution to employment of the fashion industry, especially for previously disadvantaged individuals seeking to gain a foothold on the economic ladder.

Sustainability is no longer just a buzzword in the global fashion industry as more and more designers and clothing manufacturers place a concerted effort on operating in a sustainable manner. The worldwide fashion movement aimed at building a sustainable fashion industry has also reached South African shores. The problems related to the adverse environmental impacts of the fashion industry have been flagged as requiring urgent attention repeatedly (Shen, 2014). According to the United Nations Environment Programme (UNEP), the fashion industry and fast fashion has a detrimental impact on the environment and if the fashion industry does not change the way it operates it will use up a quarter of the world's carbon budget by 2050 (UNEP, 2018). A senior lecturer in fashion marketing at the University of Manchester revealed that in the UK most fashion retailers are doing something about sustainability and have some initiatives focused on sustainability (UNEP, 2018). The strategic focus on sustainable fashion in the fashion industry is relatively new in South Africa but there has been a visible interest and drive by the fashion sector related to the launch and promotion of eco-friendly brands as well as a call to adopt sustainability practices. Leading designers in South Africa have launched eco collections and are incorporating sustainable principles into their designs in innovative ways. Events, online platforms, and other initiatives aimed at raising awareness on sustainability issues in the fashion industry are increasing in South Africa.

The creative industries are considered an integral part of the South African economic landscape. *Creative South Africa* was one of the earliest policy documents on the creative economy in South Africa produced in 1998. The report was optimistically buoyant about the potential of the creative industries and described them as, 'one of the most powerful means of enhancing the country's identity and distinctiveness, while simultaneously creating employment, developing human skills, and generating social capital and cohesion', (Creative South Africa, 1998: 6). A 2008 creative industry sector scoping report further cemented the importance ascribed to creative sectors in South Africa. In developed economies, the creative industries are a significant part of economies (Creative Industry Scoping Report, 2008). Design is a significant contributor to the creative arts sector as well as the broader economy. The design sector, including fashion design, was defined as a 'process of purposeful creative thinking work, planning and work used to identify and make opportunities that lead to cultural and commercial advantage' (Creative Industry Scoping

Report, 2008:61). The design sector is closely aligned to the arts sector. It was highlighted in the sector report that design is a key contributor to the economy by providing services, goods and outputs that define cultural identity and aid economic competitiveness. In the sector report, several impediments in the design sector that hampered success were identified. Firstly, business management and administration were a skills shortage. Secondly, operations management including contract and intellectual property management and specialist skills to keep abreast with developments in technology were also listed as being deficient in the sector. The creative industries have been neglected in South Africa but in recent years there has been a flurry of activity to promote them. Cultural tourism has been one of the drivers of growth as well as a realisation of the significance of the sector. The fashion sector has been underrepresented in creative industry strategies in South Africa and was not mentioned in detail in the 1998 Creative South Africa report or the 2008 sector report. Film was the leading creative industry in South Africa in 2008 (Creative Industry Scoping Report, 2008).

2.7.1 Types of sustainable fashion

The term sustainable fashion, also known as ethical fashion or eco fashion, has been misunderstood in so many ways and this section will give clarity to some of the terms and terminology used when referring to sustainable fashion. Companies like Patagonia, H & M and many others have become globally associated with sustainability. Despite this, there remains a lack of clarity on what the term sustainability really means. Sustainability has become associated with several meanings. Sustainability presents itself in many ways in the fashion industry and throughout the supply chain. Khandual & Pradhan (2019) provide a breakdown of techniques and types of sustainable fashion. The first type is the custom made/made to order garment and this garment is made in high quality and timeless designs in an ethical manner. This form also extends to DIY (Do it Yourself). The use of sustainable techniques or production methods also contributes to sustainability. Design plays a huge role in sustainability and can affect sustainability. Recycling and upcycling all contribute to sustainability. Recycling means to reuse; upcycling refers to the process of taking rejected articles and converting them into a product of greater value. Reconstruction is a form of upcycling that involves deconstruction of previous garments to make new designs.

Jestratjevic & Rudd (2018) propose a classification of sustainable fashion into 6 main forms while acknowledging that the concept is always changing. The table below shows the classification by Jestratjivec & Rudd (2018).

Biodegradable or Recyclable	***Biodegradable** ***Of natural origin** ***Biological decomposable** ***Environmentally friendly** ***Skin friendly/Recyclable** ***Chemical or Mechanical**
New luxury	*Produced in small scales *Based on unique designer/artisan experience *Custom made or well fitted *Durable *High quality *Repairable
Second hand and vintage	*Preloved *Compassionately shared *Affordable
Repaired, upcycled and upgraded	*Upgrades the quality *Gives new purpose *Entrance to the new lifecycle
Ethically made	*Free from human exploitation *Protect human rights *Ethically sourced and produced
Officially certified	*Guarantee of production/consumption safety *Cruelty free *Zero hazardous *Approved/ pretested quality *Legally competent

Table 2.2: Defining sustainable fashion forms, Source: Jestrajvic & Rudd, 2018In reviewing the definitions of sustainable fashion, it becomes clear that there is need to streamline the plethora of definitions and terminology relating to sustainable fashion so that the consumer is easily able to identify sustainable fashion products without having to remember all the classifications. The multitude of terms and definitions has been an ongoing criticism of green products and the green economy and has hampered consumer adoption and created a haze of uncertainty regarding green focused products. Greenwashing has been one of the criticisms of the sustainable practices of some organisations which refers to the practices of merely engaging with sustainability in a superficial way rather than a real push to ensure sustainable practices in each area of the business or organization. An evident creative focus is apparent in the incorporation of sustainable principles in the fashion sector. The opportunities to use fashion waste in innovative ways to create new garments or novel products has been observed. An African design company is breaking new ground by making shoes with fashion waste (Fashionomics Africa, 2021) as seen in **Figure 2.3** below.

Figure 2.3 Innovative shoe design based on Fashion Waste, Source: Asics, cited in Fashionomics Africa 2021

2.9 Environmental Sustainability – A growing sense of urgency

With a greater focus on environmental protection globally, the challenges facing the environment have been a key theme in the literature and with the clarion call for action becoming more insistent (Davos, 2019). As early as 2002, Schor and Taylor highlighted that sixty thousand plant species or one quarter of the world's total are in danger of being lost by 2025 and that more than half the world's fisheries are already overfished, depleted or in serious trouble and that water scarcity was accelerating. The call for effective environmental action is getting louder but is there a real focus on putting environmental issues at the top of the policy agenda? There is need for effective promotion of environmental issues to the consumer and for environmental issues to become more than just mere policy but with requisite implementation and more apparent engagement by consumers and all stakeholders. There is also need to not overstate or exaggerate the severity of the environmental crisis. A lot of positive developments reflect that in some cases environmental damage can be reversed. The Great Barrier Reef has seen extensive coral bleaching but has been restored in some parts using innovative scientific methods.

Companies are under pressure to thrive in a competitive marketplace using innovative business models and respect and consideration for the environment (Todeschini et al., 2017) and this to the large part is the key motivation to adopting a sustainability program. At the World Economic Forum (WEF) in Davos in 2019 the spiralling crisis and ongoing destruction of the environment was highlighted (Davos, 2019). Renowned Naturalist Sir David Attenborough discussed the severity of the environmental challenge with Prince William in a riveting interview highlighting how whole ecosystems were in jeopardy from human activities and marine life had been severely compromised by plastic pollution in the seas (Davos, 2019). The severity and precarious nature of environmental degradation as a result of human activity has also been a key agenda at the Virtual Davos 2021 with world leaders committing to greater environmental and social consciousness (Virtual Davos, 2021).

The Intergovernmental Panel on Climate Change (IPCC) Sixth Assessment Report (AR6) which is currently underway presents a grim picture of global warming and climate change requiring immediate attention (IPCC, 2018). In 2021 as part of the Sixth Assessment Report the IPCC released a report on the current state of the climate and stressed that it was without doubt that human activities had warmed the climate and that the scale of change across the whole system was without precedent (IPCC, 2021). The urgent need to address environmental challenges and to conserve and protect the environment has gained increasing momentum (UNEP, 2019).

At policy level globally, apart from a few errant countries and at the highest levels of government there is definitely focus on environmental actions and increasing awareness but the question that still remains is are these programs effective? There is a tendency for environmental issues to be taken lightly as the ongoing tension between the need to increase profitability is sometimes in conflict with the need to adopt good environmental practices. The number of conferences, policies, initiatives etc designed to safeguard the environment continue to increase and while this shows a definite urgency to address environmental concerns it certainly creates a landscape that is somewhat mired in confusion.

Slow fashion is based on a design philosophy that aims to increase the longevity of clothing and to discourage the excessive consumption of fashion products which leads to a rise in fashion waste and adverse environmental impacts (Cimatti et al, 2017). Slow fashion has seen rising popularity and influence in some circles (Hall, 2018). As disposable incomes come under pressure, some consumers can no longer replace and buy fashion products at the rate of previous years so are more interested in more durable and lasting fashion products and this has led to the rise of the slow fashion movement (Cimatti et al., 2017). Slow fashion is defined by (Suhad et al. 2020: 2) as a practice of sustainable fashion which is not 'time-based but quality-based' and offers a different approach and process to garment construction. The definition of slow fashion espoused by (Suhad et al., 2020: 1) describes slow fashion as 'a fashion that is designed, produced, and consumed ethically by considering environmental, social, and humanitarian issues.' The term slow fashion was created by Fletcher (2007) who opposes the fast fashion industry stating that it is driven by greed and that there is an urgent need to switch to slow fashion to counteract the negative effects of the fast fashion industry. Slow fashion has its roots in the slow food movement founded by Carlo Petrini in Italy in 1986 which focuses on savouring the taste of food, providing consumers with information on their food and protecting the cultural identities of food (Fletcher, 2007). Slow fashion provides a new paradigm for the fashion industry focused on sustainability and quality and is about 'choice, information, cultural diversity and identity ' (Fletcher, 2007:61). Bray (2017) reflects on the intentionality of the design approach in slow fashion garment construction based on a eco-friendly design collection she designed and shown at New Zealand Fashion Week. She highlights some of the brand values incorporated in the collection focused on sustainability such as local sourcing of fabrics, the inclusion of environmental values throughout the entire production chain and the fair and ethical treatment of workers.

While slow fashion has been introduced to the fashion sector and is a recognisable trend, fast fashion remains .the predominant fashion model operating globally and preferred by consumers. The shift from slow fashion to fast fashion is happening globally and has environmental implications. The fashion industry has historically been denigrated for its use of resources and negative impact on the environment. High water usage and the use of chemicals and dyes as well as unfair labour practices have all led to an industry that has had to contend with a poor environmental management reputation (Caniato et al., 2012). A lot of what impacts environmental sustainability in the fashion industry are the various production techniques and there has been a move to cleaner and indeed greener production techniques. The supply chain and logistical arrangements have a very high impact on environmental conservation and management.

Fast fashion is beneficial for the consumer as it is purchased at lower prices and the clothing is very trendy but the impact on environmental conservation is problematic. The rapid buying and disposing of clothing by consumers raises critical questions around sustainability and waste management. A recent example of the challenges around waste management in the fashion industry was a scandal that involved the illegal incineration of clothing by a leading retailer. Ozdamar-Ertekin (2019) argues that luxury fashion can lead the way in sustainability. Unlike fast fashion, luxury fashion brands are focused on durability and longevity although there has also been controversy over luxury fashion brands and their motivations for focusing on sustainability. She argues that luxury fashion brands are best positioned for sustainability. They are more able to control every aspect of their supply chain including their suppliers and their focus on the triple bottom line and can provide transparency in their operations unlike fast fashion brands.

Caniato et al. (2012) conducted case-based research focused on identifying three factors relating to environmental sustainability in fashion supply chains; the drivers that push companies to adopt green practices, the different practices that can be used to improve environmental sustainability and finally, the environmental key performance indicators measured by fashion companies. The fashion industry because of its high usage of water and chemicals has been widely criticised. Scandals such as the use of transgenic cotton which is genetically engineered cotton infused with herbicidal and insecticidal properties have all led to a somewhat tainted reputation as regards conservation and management of the environment (Caniato et al., 2012; Shen & Li, 2015). More recently, Pal & Gander (2018) corroborate this view stressing the highly publicised negative impacts of the fashion industry which include high water usage, pollution from chemicals used in the manufacturing process and the ongoing challenges around waste management and the disposal of unsold stock through destructive practices such as incineration or dumping making the fashion industry very environmentally unfriendly. The European Environmental Agency ranks clothing, textiles, and footwear fourth in the list of industries harmful to the environment (Pal &

Gander, 2018). In particular, the production process in large factories is a huge threat to the environment.

The undesirable impacts of the fashion industry are a key theme in the literature and textile choice plays a pivotal part in harmful environmental impacts. Synthetic fibres made from non-renewable resources are an environmental threat. Cotton and wool production require large quantities of water and huge pesticides. Transportation and distribution are a key source of environmental impacts and the global scale of the fashion industry which involves moving products from low labour countries to consumers in Europe and the US with the consequent environmental impact. A study carried out by Tengku Nurul Aisha Tengku Aziz et al. (2016) highlighted developments in environmental readiness for the logistics industry. The results revealed that a greater focus on environmental sustainability led to a favourable impact on a company's business. The logistics industry plays a pivotal role in the supply chain and is often the weakest link in the implementation of sustainability. The term 'green logistics' has become a buzzword which highlights the focus on converting the logistics industry into an eco-friendlier component of the supply chain (Tengku Nurul Aisha Tengku Aziz et al., 2016).

The need to thrive in a competitive marketplace has been a driver for companies to adopt environmental sustainability and trends that are shaping environmental protection and social impact include circular economy, fair trade, lowsumerism and the sharing economy (Todeschini et al., 2017). While the rising influence of sustainability is apparent and theories of environmental sustainability abound, there remains a gap between what theory argues and the levels of environmental and social sustainability when theory is put into practice (Todeschini et al., 2017). Most research on the topic of sustainable business models is still exploratory and does not fully engage with these approaches (Todeschini et al., 2017: 259).

Naidoo & Gasparatos (2018) identify three main types of activities adopted by retailers to promote sustainable production and consumption. Firstly, there is a focus on managing the sustainability impacts of their own operations such as their stores, headquarters, and warehouses through the implementation of an environmental management system. Secondly, managing sustainability throughout the value chain is a priority usually by working with their suppliers, developing sustainable products, cleaner production techniques and selecting suppliers according to sustainability criteria. Stakeholder engagement through consumer education about sustainable consumption, incentives to buy eco-friendly products and offering advice on product sustainability is also important.

In South Africa, various policies have driven the environmental agenda over the years (DEA, 2011). Sustainable Development is a national priority integrated into the National Development Plan (NDP) and the focus of the NDP is to address the challenges facing South Africa which stem largely from its historical legacy of apartheid which are poverty, inequality, and unemployment (DEA, 2011). Several priorities have been identified by government as central to sustainable development in South Africa. The need for innovative solutions to environmental challenges and sustainable consumption and production is an important focus. The incorporation of indigenous knowledge in environmental policy formulation and actions is seen as important to address environmental challenges. Other important priority areas include waste management, climate change, low carbon footprint in industrial activities, sustainable access to natural resources by communities to enable conservation but also ensuring poverty eradication and food security. The safeguarding and management of coastal resources is also pivotal to environmental management in South Africa. The National Strategy for Sustainable Development and Action Plan (NSSD 1) has identified five strategic objectives, 'enhancing systems for integrated planning and implementation, sustaining our ecosystems, and using natural resources efficiently, towards a green economy, building sustainable communities and responding effectively to climate change (DEA, 2011: 5). These strategic objectives and various programmes or interventions are being implemented throughout the country.

There are a number of factors that can influence consumer purchasing behaviour in relation to their fashion choices. The demand for fashion products is influenced by many variables such as the weather, films and even by pop stars and footballers (Cierniene & Vienadiene, 2014). Consumers often make the decision to buy a particular product at the point of purchase therefore the availability of suitable merchandise instore is critical and fast fashion addresses this need.

In our media saturated world sometimes choosing what to wear is as simple as what a celebrity wore to the Grammys. What Beyoncé is wearing on the latest cover of her platinum selling album may be the strongest determinant of what a consumer will buy. A key sports influencer like Naomi Osaka can also be a fashion icon sparking new trends and new fashion directions. It really can be that simple, especially for young people who are strongly influenced by celebrity culture. Celebrity and glamour have a strong influence on clothing purchasing behaviour especially for millennials driven by the 'commodification of celebrity and its trappings and the democratization of celebrity across the globe' particularly in the more affluent regions of the globe (Currid-Halkett & Scott, 2013:3).

As pointed out by Currid-Halkett & Scott (2013:4), 'the star system has diffused into scores of sectors in the cultural economy' and plays a pivotal role in driving trends. The influence of celebrity culture on fashion choices is evident and celebrities themselves have often chosen very controversial fashion pieces. Lady Gaga, a well-known musician, caused a stir when she arrived at the MTV Video Music Awards in 2010 wearing a dress made of raw beef and there has been an ongoing push not to wear fur in Hollywood based on cruelty and animal abuses. Kendall Jenner, a young American model, and star of the popular reality TV show, *Keeping up with the Kardashians* launched a successful cosmetic and fashion brand enticing her followers to switch to more sustainable choices and this has a huge impact because of the size of their fan base. Rihanna, a celebrity musician, in a surprising twist rebranded herself as a fashion and beauty entrepreneur steering from her musical roots to reaching for fashion stardom (Bloomberg, 2019). Her fashion and cosmetic brand *Fenty* has successfully transitioned her to a serious fashion entrepreneur rebranding her in a rather intriguing way (Bloomberg, 2019). Fashion leaders defined as consumers who have a very strong interest in fashion and spend and search for more fashion items can play a role in spurring consumers to slow fashion purchases (Cavender, 2018). Fashion leaders' purchases are driven by trends in the media, celebrity trends etc and their influences can play a role in steering consumers away from fast fashion to slow fashion purchases if they are knowledgeable about environmental and slow fashion argues Cavender (2018).

In-store factors can sometimes be the most important determining factor of consumer purchasing behaviour of eco fashion products but often the premium price of eco fashion products remained a hindrance to the adoption of eco fashion by consumers. A study by Chan & Wong (2012) revealed that in-store factors such as visual merchandising strategies and promotions focused on enticing consumers to switch to sustainable fashion choices have the greatest impact on consumer purchasing behaviour of eco fashion products. The Swedish fast fashion clothing retailer, H&M (Hennes & Mauritz), is well-known for its highly publicised sustainability focus which is also evident in South Africa. H&M, according to Shen (2014), provides a number of key lessons on various aspects of sustainability although H&M'S sustainability focus seems to have a very evident promotional and publicity intent which can appear like greenwashing and H&M's sustainability focus has been largely on the supply chain. Firstly, lessons of supplier selection. H&M are less likely to select suppliers from countries with high levels of human wellbeing. This trend is evident worldwide. The problem is in those countries while garment workers may appreciate their jobs, their working conditions are usually quite deplorable. H&M was one of the first stores to launch online stores which as we have seen in the COVID- 19 era has been the trend as shops closed in the earlier phases of lockdown. H&M also tends to carry higher levels of inventory in countries with a high level of human wellbeing. The question that lingers regarding H&M's sustainability focus is has there been a critical interrogation of this sustainability push to see whether sustainability principles are being adhered to truly and what has been the measurable impact on the environment, or it is just a case of astute marketing or window dressing?

Figure 2.4: Swedish Global Clothing Chain - H&M (Hennes & Mauritz), Source: ecotextile.com

The marketing benefits of a publicised sustainability focus may be underpinned by a scant regard for the environment and the ethics of the fashion industry. A holistic sustainable fashion strategy should go beyond mere tweaking of a few sustainability indicators.

> Sustainable fashion is intended to generate wellbeing not only for companies and shareholders but for all different stakeholders and people involved in or affected by

the sourcing, production, use reuse, and disposal of textiles (Jestratjivec & Rudd, 2018:220).

A frequent criticism of very public company displays of sustainability initiatives is that companies adopting such a strategy may be more concerned with publicity and promotional benefits and with canvassing goodwill from stakeholders, rather than engaging with the very integral issues that plague fashion's interaction with the environment and that there is need for higher levels of transparency and disclosure in business operations.

2.10 The importance and challenge of waste management

Waste management poses a huge challenge in the fashion industry and has been widely documented as a real bone of contention in an industry that has faced growing criticism and disdain regarding its impact on the environment. The advent of fast fashion and a culture of purchasing easily disposable clothing has exacerbated the waste crisis in the fashion industry. As noted by Dissanayake & Sinha (2012: 77), 'post-consumer textile waste has gained increasing attention, both within the industry and academia.' Dissanayake & Sinha (2012: 77) stress the contradictory and conflictual nature of the fashion industry and its environmental impacts pointing out that 'fashion consumption and sustainability are often opposing ideas' and that 'fashion consumption is a highly resource-intensive, wasteful practice and sustainability frowns on wasteful consumption.' The challenge of waste management in the fashion industry is significant requiring urgent attention. The World Bank paints a gruesome portrait of the state of solid waste management globally and particularly so as waste generation is rising rapidly. According to the World Bank, 2.05 billion tons of solid waste was generated by the world's cities in 2016 (World Bank, 2019). The unequal impacts of poor waste management practices are evident. The poor living in cities particularly in the developing world often bear the brunt of waste management issues living in environmentally unsafe spaces exposing them to myriad health hazards. Effective waste management is a hallmark of well-planned and liveable cities and is a significant component of municipal budgets.

Waste management plays a role in environmental sustainability in the fashion industry and the reduction, reuse and recycling of materials can minimise waste generation and land use for waste disposal (Delai & Takahashi, 2013). Cimatti et al. (2017) highlights how fashion trends evolve very rapidly and due to this ever-changing cycle, a lot of waste is generated. Scraps, threads, and other waste generated by the fashion industry in garment production all need to be disposed of. The impact of the fashion industry on oceans and water bodies from pollution by microfibres and microplastics poses a serious threat to marine life. According to the United Nations Environment Programme (UNEP), 60 % of material in our clothing is made of plastics such as polyester, acrylic and nylon and when these fabrics are washed they shed very small plastic fibres called microfibres and most waste treatment plants are not designed to remove microfibres (UNEP, 2019). The environmental impacts of these microfibres and other microplastics is catastrophic to aquatic life through plastic ingestion which leads to 'starvation, endocrine disruption, stunted growth' (UNEP, 2019'. The need to address waste management issues in the fashion industry is a key priority. There are considerable volumes of waste generated in the fashion industry requiring a sound waste management policy. There are initiatives to use fashion waste in an innovative and creative ways recreating new garments, reusing old garments and many other ways to create rather than discard and recycling in particular has influence and applicability in the fashion industry (Eladwi et al., 2016). How can the fashion industry really address the issue of waste management? What can be done to dispose of the tons of clothing generated by the industry? Are there viable options beyond incineration or dumping? Can the situation be saved? These are some of the questions that the fashion industry is grappling with.

The waste management scenarios in the developing world are markedly different from the developed regions of the globe where more defined and effective waste management policies are in place. In the developing world there is need for more effective waste management policies. Sites of huge heaps of putrefying and decaying rubbish are commonplace in African cities as well as notable air pollution and illegal dumping of waste and pressure on municipal resources has seen the situation worsening in many cities. Waste management has become an indicator of functioning urban and city policies in diverse cities across the world. The issue of waste management has become a key research area and especially the management and disposal of solid waste in urban precincts. A lack of resources and effective planning policies can often hamper waste management in developing cities. Larney & van Aardt (2010) note the dependence on the availability of landfills and affordable costs of effective waste management in the fashion industry and that in South Africa most apparel manufacturers use landfills and that there is also a keen interest in recycling.

How can we address the issue of waste management more effectively in an environment where resources may be limited? Could the fashion industry be the industry that sets a precedence for other industries to adopt better waste disposal practices? Are there cities that have been successful in their waste management policies and could provide direction and leading as regards waste management? The fast-moving consumer goods companies have often led the charge in their implementation of environmental programs and could be an industry where the fashion industry could perhaps glean some best practice initiatives. Innovative use of fashion waste such as scraps of fabric can contribute to environmental sustainability. Nayak et al. (2020) identify innovative ways of using fashion waste. Recycled waste clothing can be used in mattresses and fashion waste in landfills can be reduced by extracting fibres for reuse. Cotton is the predominant waste of post-consumer waste. Global attention on the problems of fashion waste has increased and varying measures adopted to stem unsustainable waste management and the use of illegal dumping sites and methods. It is unlikely that the challenge of waste management will have an easy solution but there is room for innovative solutions and the use of technology has been beneficial. Effective strategies for waste management comprise a critical aspect of sustainable practices and many sustainable practices are hinged on an effective waste management policy.

2.11 Environmental Accounting – A new paradigm in sustainability?

The rising concern regarding increasing environmental problems locally and globally has led to a shift in the importance ascribed to environmental concerns in country performance indicators. Environmental accounting is a relatively new field that seeks to quantify the impacts of environmental degradation from anthropogenic activities on national economies (Franzese et al., 2019). The emergence of the "Green GDP" or GGDP is an alternative economic index based on the monetisation of the environmental consequences due to economic growth (Franzese et al., 2019). This index includes resource depletion, biodiversity loss, environmental degradation, and protective and restorative environmental initiatives to be factored into the calculation of GDP. Several countries have put forward their own method of calculating GGDP and the United Nations published the system of Environmental Economic Accounting (SEEA) to provide an internationally standardised statistical method for environmental accounting (United Nations, 2021). There are several aspects that influence the performance and environmental reporting practices of organisations such as the level of implementation of the environmental management system and other determinants that may result from organisational factors, external factors, and stakeholder pressures. While environmental accounting sounds like a promising avenue to address and quantify environmental degradation, is it a practical way of measuring environmental conservation? Inevitably as with any accounting system, problems such as underreporting or overstating and even totally fabricating numbers will most likely occur in the quest to adhere to environmental standards and indicators. Nonetheless, it does bring some measurability to environmental degradation and instead of sweeping generalisations there are real numbers that can indicate the extent of environmental damage.

Environmental reporting in South Africa is on the increase, especially for companies on the Johannesburg Stock Exchange and has become a focus area in annual reporting requirements of companies. Major clothing retailers like H&M, Edgars and Woolworths all have sustainability departments and are mandated to report on their sustainability initiatives.

2.12 Transportation and Distribution in Environmental sustainability practices

Transportation plays a vital role in environmental sustainability practices and is a highly polluting activity and retailers have several innovative ways to reduce the environmental impact of transportation or distribution logistics in the supply chain (Ramanathian et al., 2014). The level of environmental impact depends on the type of transportation used (Teibel, 2019). The selection of 'appropriate vehicle types, managing and monitoring delivery schedules, freight flow consolidation and fuel selection' all play a part in the move to green practices in the transportation sector (Ubeda et al., 2011, cited in Naidoo & Gasparatos, 2018). Transportation and the ability to switch to more environmentally friendly fuels and the use of vehicles that conserve energy and are fuel efficient has not been specifically investigated in South Africa but will certainly have a bearing on the ability of the industry to control this variable in the design of an environmentally friendly supply chain. While small fashion design businesses are unlikely to grapple with this aspect of sustainability, it becomes an issue in large clothing companies in a significant way.

2.13 Water Conservation, the circular economy and environmental conservation

Water scarcity is a global challenge and while there is enough water for the world's population, it is not evenly distributed resulting in water scarcity and water shortages. Water is a vital resource and as cycles of drought and precipitation shortages increase, the need for responsible and accountable use of the earth's water resources is non-negotiable. Whole regions are in danger of losing out on a resource that is vital to the functioning and sheer survival of societies. The water crisis that emerged in Cape Town is a sober reminder that we cannot adopt a laissez faire approach to water management in South Africa and across many drought-prone regions of the continent. The fashion industry is a very water intensive industry and has been heavily criticised for its use of water and the potential and ability to pollute water resources (Pal & Gander, 2018). Cotton is one of the 'thirstiest' crops and requires large quantities of water yet it a very popular fabric in garment manufacturing (Partzsch & Kemper, 2019). Rising volumes of textiles are disposed of in landfills (Grebosz-Krawczyk & Siuda, 2019). The textile industry is a key polluter of water bodies and a high consumer of water (Lellis et al., 2019). It is estimated that more than half a trillion gallons of fresh water are used to dye textiles annually (Teibel, 2019). Therein lies the difficulty, how do we balance the need to conserve water and the fashion industry's unavoidable use of water? Many retailers have adopted initiatives that address this specifically. South Africa has grappled with water shortages and notably the challenges in the Western Cape and this reinforces the need to adopt viable environmental practices across all industries. Water conservation impacts environmental conservation, and the adoption of appropriate water conservation techniques is vital to enabling environmentally sound supply chains in the fashion industry (Pal & Gander, 2018).The sustainable development goals and particularly sustainable development goal 12 which focuses on responsible consumption and production can catalyse the proliferation of corporate environmental strategies (CES) in the retail sector (UNEP, 2019). The sustainable development goals help to shed light on the issue of sustainability but have also been controversial as regards quantification and measurability of sustainability indicators. According to Todeschini et al. (2017), the circular economy can play a role in reducing the environmental impacts of the fashion industry. The circular economy can promote product development based on sustainable products (e.g., green products and cleaner technologies) and recycling clothes (upcycling and reuse of fibres from disposal clothes). At each stage of garment production circular economy principles can be incorporated promoting sustainability and an approach to garment construction that emphasizes longevity and durability with environmental consciousness.

The circular economy has underpinned a lot of what is taking place in relation to environmental sustainability in the fashion industry and the prevailing ethos. The principles of a circular economy have driven economic trends. A circular economy is defined as 'an economy that is restorative by design and aims to keep products, components and materials at their highest utility and value at all times' (Todeschini et al., 2017:761; Matusovicova, 2021). The role of the circular economy and its ability to contribute to a more robust approach to sustainability is apparent. The circular economy is able to provide guidelines for product development focused on sustainable products and the recyclability which refers to the ability of the clothing to be upcycled and the reuse of fibres from disposable clothes (Marques et al., 2019).

The circular economy provides opportunities for 'innovation in product design, service, and business models and as a result it provides the building blocks for a long-term resilient system' (Todeschini et al., 2017:761). The adoption of a restorative or circular way of thinking in the fashion industry will reduce environmental degradation. Recycling initiatives and reusing of old fashion garments in novel ways are examples of the circular economy. Food waste has also been used to produce biotextiles creating a symbiotic circular system which reduces waste in the food industry and benefits the fashion industry (Provin et al., 2021).

Brydges (2021) investigated the application of circular economy principles in the Swedish fashion industry and noted the challenges faced by businesses seeking to apply circularity in their businesses but discovered that brands had started to incorporate various practices and were optimistic about them but tended to focus largely on waste management. The circular economy certainly offers a new way of thinking regarding resource management and the ability of industries to safeguard and preserve resources while also reducing costs and maximising profitability. Industries across the spectrum have started to explore ways in which they could design their operations in a manner that does not only consume or deplete resources but to incorporate best practices in the supply chain. Circular economy thinking certainly offers some suggestions on how the fashion industry could be designed viz a viz its ongoing challenges around waste management and other indicators of sustainability.

2.14 Towards a more sustainable fashion industry

The question of sustainability has never before in history been more pertinent as the COVID-19 pandemic shakes up industries and demolishes previous profit forecasts and while the quest for environmental sustainability is key, will it now receive greater acclaim or less acclaim as an unfolding virus situation develops? Nonetheless, sustainability is by no means a static concept but will certainly be looked at differently post COVID-19 as industries grapple with rebuilding sales revenues and facing possible losses and even bankruptcy. The retail industry has been slowing down as new ways of shopping emerge, and digital connectivity pushes the customer out of the store and into cyberspace. Definitional issues plague the concept of sustainability and the lack of a formally defined protocol on environmental practices in the fashion industry is an issue. The continuing lack of clarity regarding the definition of sustainable development and the tendency for profit motives to take centre stage is an area that will most likely hamper the development of sustainability programs. The challenges in the local fashion industry are a barrier to the successful implementation of an environmental management program most likely. The question that lingers is can eco fashion move from being a small-scale, niche and narrowly focused sector or product type to a more mainstream product with a large following and the potential for real impact on the environmental concerns that have plagued the fashion industry?

The literature shows that there are worthy efforts towards addressing environmental concerns in the fashion industry. The Global South has not really been researched in relation to the fashion industry and environmental sustainability. Most of the research that is emerging is still focused on the developed regions. There also remains a difference between what theory argues regarding sustainability and the levels of environmental and social sustainability realised when theory is put into practice and research on the topic of sustainable business models is still exploratory (Todeschini et al., 2017).

Sustainability in the 21st century has gone beyond a reporting requirement that is not really placed high on the policy agenda, but real accountability and monitoring is required and often from the very vital areas of government and policy formulation. In South Africa, the environment is a top priority and there is much that is being done to safeguard the environment and move towards sustainability. A unique challenge with environmental management in South Africa is the need to ensure that environmental resources benefit the most marginalised and poor but simultaneously ensuring that environmental resources are not overused or needlessly exploited and destroyed. How the two priorities can be achieved becomes somewhat of a balancing act and the question that lingers is can we use environmental resources wisely and implement conservation methods but still ensure that communities and organisations achieve their sustainable livelihood objectives?

While there has been very little research focusing on sustainability within the fashion industry specifically and looking at eco fashion in Africa and specifically in South Africa, it is likely that the same themes of ensuring that poverty alleviation and sustainable livelihoods are in tandem with environmental protection will emerge and must be considered. This study should contribute to environmental management in South Africa and shed light on an area that needs to be addressed urgently as environmental concerns become more and more critical to the long-term sustainability of the country's economy. Questions around viability and profitability must always remain at the forefront and will certainly have a bearing on any sustainability program. The fashion industry by its very nature is a relatively easy industry to enter and has therefore attracted small business owners across the country.

The environmental justice movement has become a pivotal pillar of environmental and social justice paradigms. The fashion industry has long been associated with unfair labour practices and unsafe and inconsiderate working environments. Environmental justice (EJ) and PE (Political Ecology) in recent decades have become critical approaches to investigating social justice concerns across a broad range of industries. Justice in this world has become somewhat of an elusive concept as those who have economic power wield considerable power over those who may be incapacitated financially. Within the environmental sector, the environment has so often been treated very callously and we are now seeing the unfortunate effects of not upholding environmental dignity and respecting boundaries even within nature. The onset of the COVID-19 virus in December 2019 speaks resoundingly of what can go wrong when man flouts the rules of maintaining ecosystem integrity as it sweeps throughout the globe leaving a trail of destruction and tragedy. We have no one to blame but ourselves when nature turns rogue and in an almost seemingly evil manner and almost in the style of a macabre horror movie exacts vengeance on man never before seen in history. The death toll from the COVID-19 virus is catastrophic and the virus has completely disregarded status and social capital and any other demographic criteria. The tenets of justice are often quite sinister and when we flout laws that have enabled mankind to live amicably with other inhabitants of the earth it often seems like the law of karma takes over. What you do to another will one day come back to bite you and the virus emerged from the animal kingdom to exact vengeance on mankind in a tragic and horrific way. Mankind has treated the environment with disdain for years and now we can see that such an attitude has repercussions that we could never have predicted, had we been able to.

Social justice issues relating to the working conditions of women in the fashion industry and the sweatshops found in locations across the globe have long been discussed and criticised. The devastating Rana Plaza collapse in 2013 highlighted the inhumane conditions that workers in the fashion industry in low-income countries have to endure. The COVID-19 pandemic may well be the defining event of this new decade and will shape the trajectory of industries including the fashion industry in the years ahead and a pertinent question asked by Brydges et al (2020) is whether the COVID- 19 pandemic will be instrumental in the transition to sustainability in the fashion industry. The fashion industry can no longer continue to neglect or downplay the adverse impacts of the industry on the environment but concerted, targeted and effective action to reduce environmental impacts is now a policy priority. Concerns relating to the fashion industry and environmental impacts need to take centre stage in all types of fashion businesses and as articulated by Ozdamar Ertekin & Atik (2020) a focus on sustainability needs to become an intrinsic part of the fashion system.

CHAPTER THREE

Methodological Considerations

3.1 Introduction

In this chapter, a critical appraisal of the methodological approach and the research design of this study is presented. The methodology of a study underlies the credibility, applicability, replicability, and verifiability of the study and is a critical aspect of any reliable research design. The methodology of the study will be critically presented and analysed with a specific focus on the actual experience of carrying out the study during a global pandemic. In this chapter I will outline amendments made to the methodology of the study to respond to factors arising at the time of data collection, notably the sudden onset of the COVID- 19 pandemic. Amendments made to the study methodology in response to the COVID- 19 pandemic, restrictions and social distancing policies will be highlighted. In Chapter One I outlined some aspects of the methodology in brief as well as methodological amendments made to the study but in this chapter I will present my experiences in more detail. In the covid era and in response to COVID- 19 restrictions new methods of research online and the greater use of online platforms was seen. Virtual crowd sourcing platforms were used in greater measure and more and more online methodologies are combined with field based research methods.

The study is a qualitative study based largely on online email survey data, telephone interviews and WhatsApp conversations, social media research and document analysis. Qualitative studies enable in-depth exploration of study aims and objectives obtaining detailed responses with the opportunity to really delve into critical aspects of the study and to answer the research questions critically. Qualitative studies enable in-depth analysis and the interrogation of individual responses to the study bringing a robust and rounded approach to answering the research questions. In this instance, the choice of a qualitative study was to allow an in-depth investigation into an emerging research area that is still under-researched in the global south and is evolving in the global north where there is a growing body of research yet often in a rather fragmented way. The adaptable nature of qualitative research proved useful when the pandemic struck, and the research approach had to be modified slightly. Research into sustainable fashion in the global south has been largely exploratory in nature and theory building is still in process. The study was not aimed at generating numerical data, but it is interspersed with quantitative data pivoting the study slightly to incorporate aspects of a mixed methods study. The researcher was locked out of South Africa during 2020 and had limited access to South Africa during 2021 and carried out two years of the research remotely from Harare, Zimbabwe. Remote working complicated data collection and required agility and a nimble approach to mitigating the challenges of carrying out research during a global pandemic. The carrying out of research during a global pandemic and a period that has disrupted the way businesses operate has left industries, including the fashion industry, in viability distress and was certainly challenging.

The inner city of Johannesburg and the site of the Johannesburg Fashion District is a key part of the study but insights relevant to this study about the district had to be obtained from telephone interviews and the Johannesburg Development Agency website as well as other web-based sources.

The impacts of the COVID- 19 pandemic have been incorporated into the study as it has changed the operations of fashion businesses and has the ability to indelibly change the trajectory of the fashion industry in the years ahead. These impacts will be presented in Chapter Seven.

3.2 Research Methodology

The ability to conduct in-depth discussions in a qualitative research design was appropriate to the objectives of the study and the still-budding nature of sustainable fashion which is still developing and emerging especially in the global South. Kumar (2005) points out the step-by-step nature of research design and stresses the importance of a logical and step by step approach to research design and methodology and how research is actually a way of thinking based on sound principles. As concisely espoused by Kumar (2005) a faulty research design will not yield credible results. The importance of an effective and credible research methodology is a key theme in the literature. An effective research design needs to be based on sound and proven scientific research principles and be easily replicated and adhere to the highest standards of excellence. The study is a predominantly qualitative study with limited quantitative data incorporated to bring attention to key trends that have shaped the industry. Increasingly qualitative methodologies have been given higher status and can provide in-depth insights (Njie & Asimiran, 2014). Qualitative research methodologies have been used more frequently in the last few decades (Mohajan, 2018) Qualitative researchers can develop a robust methodology by focusing on 4 criteria: representativeness, reactivity, reliability and replicability (Katz, 2015). Conducting research in the covid era brings a set of challenges and as outlined by Sy et al, (2020) specific considerations include research ethics and integrity, research design, data collection methods, research opportunities, implications and limitations.

While this study is a qualitative study, I sought to bring into the empirical evidence some key statistics regarding the marked shift in performance of the South African fashion industry in recent years with the aim of highlighting and interrogating these changes that have occurred in the South African fashion industry in the post-apartheid era. The study is by no means a quantitative study but has tried to swivel slightly to incorporate statistics relevant to the research questions to contain elements of a mixed methods study. Mixed methods studies have their roots in psychology when Campbell and Fiske (1959) introduced the "multimethod approach" and suggested that researchers collect multiple quantitative measures and assess them with separate methods to study one psychological construct..

3.3 Site of the study

The site of the study was initially Johannesburg but included other regions in search of respondents willing to participate in the study. Johannesburg had initially been chosen as the site of the study as it has been identified as a key fashion city and has a critical mass of designers in visible fashion nodes around the city such as Rosebank, Sandton, and Melville where a creative fashion vibe is evident. Had the pandemic not hampered access to designers, that approach would have been ideal enabling the researcher to immerse herself in the city's small scale fashion industry. The advent of the COVID- 19 pandemic significantly shifted the research approach to an online approach as social distancing and lockdown limitations prevented direct contact with respondents which did somewhat thwart the research plans intended. Some of the designers who participated also hailed from Cape Town. Cape Town was awarded the UNESCO City of Design a few years ago recognising the creative focus of the city. Designers in the study were not limited to those who specifically focused on eco fashion. The rationale behind not limiting the study to only those who have specifically identified themselves as eco fashion or sustainable fashion designers is to provide an inclusive study that goes beyond the somewhat niche nature of eco fashion to probing sustainability factors that all designers encounter in their work. Regarding environmental sustainability, the environmental conservation movement has been very vocal in promoting the need for all sectors to incorporate sustainability principles and in the build-up to the COP26 conference in November 2021 in Glasgow there has been heightened global media attention on environmental concerns caused by anthropogenic activities and a spotlight on the very real issues regarding climate change facing humanity.

The fashion industry, by its very nature, has an adverse impact on the environment particularly when large scale production facilities are used with high water consumption, the use of chemicals and dyes, unsustainable or wasteful resource usage and poor waste management practices (Shen, 2014). The Johannesburg Fashion District's location in the

Johannesburg CBD which has been the focus of significant inner-city renewal initiatives will add an interesting dimension to the study. The Johannesburg Fashion District is located in the inner city's eastern quadrant bordered by Von Wielligh, Market, End and Kerk street (Johannesburg Development Agency, 2018).

Figure 3.1 : A snapshot of the Johannesburg Fashion District, Source: Johannesburg Development Agency (JDA)

The Johannesburg Fashion District has a distinctive artistic flair with the innovative use of bright and luminous colours in the architectural design of the district's buildings and in a revolutionary streetscape design creating an ambience or environment that is quite striking and original within the inner city (Johannesburg Development Agency, 2020).

Contrary to what had been the initial vision of the Johannesburg Development Agency and other stakeholders, the district remains somewhat subdued with an air of a region somewhat failing to live to up to the expectations of the initially developers who had envisaged a very vibrant precinct. That said, the area is easily recognised in the streetscape design as a fashion focused region although certainly not with the visibility and impact initially envisaged. This may be due to the district’s hidden location outside the very accessible areas of the Johannesburg CBD and the perception that the inner city is still an unsafe area. In the CBD the Fashion District precinct almost emerges as a surprise location, standing out rather distinctly from the other buildings, retail spaces and activities in the CBD. Nonetheless, in many ways it has become a hub/centre of the Fashion industry in the city although perhaps not on the scale initially envisaged.

3.4 Methodological Amendments

The study was initially Johannesburg focused and the sample profile intended was fashion designers based in the Johannesburg Fashion District and other designers based in Johannesburg at disparate locations, but this had to be modified due to the COVID- 19 pandemic. Lockdown restrictions that prevented face to face interviews and shifted the study to online surveys, telephone interviews and other remote approaches to data gathering. The scope of the study was also changed to a countrywide study. Furthermore, document analysis played a greater role in the study than had initially been anticipated before the virus but served to strengthen and ground the study and to enable the examination of all three key objectives of the study

Designers included in the study were sampled from a list of designers in South Africa obtained from the SA Fashion Week handbook and recruited to participate in the study via email. The handbook has a mix of clothing and accessories designers, and the study sample was drawn from clothing designers listed in the handbook. This list in the SA Fashion Week handbook is by no means an exhaustive list of designers in South Africa as many emergent designers are not affiliated to any organisation or listed in any kind of organisational database. To all intents and purposes, the designers listed in the SA Fashion Week

Handbook are the more prominent and established designers who participate in industry events and showcase at fashion week events, i.e., SA Fashion Week. The response rate to the email survey sent out to designers listed in the handbook was not good probably as a result of the COVID- 19 pandemic restrictions and prevailing environmental uncertainty. Six designers based in Johannesburg and Cape Town agreed to participate in the study of a population of almost 80 designers approached to participate in the study via email. The table below shows the number of designers from each location. More designers were interviewed from Cape Town. Four designers from Cape Town and 2 from Johannesburg in June and July 2020 at the height of the COVID pandemic.

Designer location	**Number of Designers**
Cape Town	4
Johannesburg	2

Table 3.1: Number of designers from each location

Some designers had agreed to participate but did not return the completed survey questionnaire citing various reasons mainly related to pandemic difficulties. The researcher followed up the outstanding questionnaires repeatedly, but to no avail. The carrying out of the data collection aspect of this study in early 2020 and at the height of an unprecedented pandemic made it difficult to recruit participants or respondents who were willing to be a part of the study. The prevailing aura of uncertainty, fear and upheaval was not conducive to data collection. Nonetheless, six designers agreed to participate providing detailed sustainability information, and their insights were incorporated into the study and a seventh designer was interviewed in 2021.

I had hoped to be able to assess the attitudes and experiences of potential or current customers of small-scale fashion producers towards sustainability by carrying out a consumer survey. Consumers were meant to be intercepted at Rosebank Mall and asked to fill in a short questionnaire regarding their eco fashion purchasing behaviour and awareness. These consumer surveys planned for Rosebank Mall had to be cancelled because of the danger of contracting the virus while speaking to randomly selected shoppers at the height of the pandemic. I managed however to engage with and interview consumers in Southern Africa.

The research scope was also extended to a countrywide study drawing respondents from regions outside Johannesburg in an effort to increase the study sample and the sample of the study mainly included designers from Johannesburg and Cape Town with more participants from Cape Town. Respondents in the study are small scale fashion producers or small fashion design businesses focused largely on the production of bespoke garments and uniquely distinctive apparel. Small-scale fashion producers focus mainly on a slow fashion approach to garment making, paying critical attention to individual garment construction and design detail approaches driven by creative inspiration drawing from culture, nature, travel, global trends, current affairs, and history to name a few.

Online surveys and telephone interviews with key informants who are influential leaders in the fashion industry offered unique insights into the fashion industry in South Africa during a global pandemic. A two-step approach was used in data collection. To elicit insights relevant to small scale producers’ engagement with sustainability an email survey was the first step of data collection eliciting few responses and designers who responded to the email survey were then contacted in the next step for a more in-depth telephone interview or a WhatsApp conversation. The email survey was drawn up to address key focus areas of the study including the designers’ propensity to launch a eco fashion range and other sustainability focused areas such as waste management, transport usage etc, Key informants were also initially contacted via email, and some agreed to online interviews/surveys, others to telephone interviews and some opted for WhatsApp conversations. The response rate to the surveys conducted may have been low but it was immensely humbling and heart-warming to see that those who participated were enthusiastic, informative, and very willing to provide relevant information and I thoroughly enjoyed every interaction with all the respondents. Document analysis also provided insights, and the documents reviewed included websites of the designers who participated in the study as well as other relevant information online and in the public domain such as social media pages, news articles, activities, statistical data and objectives of key fashion support organisations, fashion industry reports to name a few.

Initially the Johannesburg Fashion District had been a key site of the study but again due to restrictions of the COVID- 19 era, access to designers based in the district was not possible. The district has become a recognisable fashion precinct in the Johannesburg CBD but has developed in a somewhat different manner to what had been outlined in the initial Johannesburg Fashion District business and development plan as it has mainly attracted immigrant designers such as Asian and African designers but has struggled to attract key South African designers. Some designers who had been based in the district have moved out of the district to other locations around the city. Nonetheless, the district is in some respects still a credible hub of the fashion industry in Johannesburg although it has not achieved the growth outlined initially. A telephone interview was conducted with the head of the Johannesburg Fashion District Institute and further insights into developments in the district in the public obtained from relevant websites and in particular, the website of the Johannesburg Development Agency. The district is located in an area that has been earmarked and distinctly noticeable as a fashion site in a potpourri bright colours and design that stands out as a fashion focused region. In many ways it is a centre for the fashion industry, but designers have preferred other sites around the city. Many designers have moved out of the Johannesburg Fashion District although it continues to evolve somewhat slowly and in a manner not necessarily predicted at its inception.

The spatial distribution of small-scale fashion producers in South Africa will be interrogated in chapter four but has tended to follow a conglomeration where urban centres and key cities have been focal points of the industry. The designers included in the study hailed from Johannesburg and Cape Town which are the two largest cities in South Africa recognised as key fashion cities in the South African fashion industry and where the industry has been identified as a key economic development priority. The sample frame from which the designers included in the study was drawn had designers from across the country, i.e., designers listed in the SA Fashion Handbook. What was unexpected was the low response rate to the email survey, but it can most likely be attributed to the coronavirus disturbances to businesses, daily lives and the generally uncertain and disrupted environment in the country which left small scale producers unable to sell their merchandise instore and necessitated a switch to digital platforms and the virus limitations also led to a consequent decline in income.

3.5 Analytical Considerations

The qualitative insights from the study were analysed using a mixture of thematic and content analysis. Insights obtained from the primary research respondents *(fashion designers and influential leaders in the fashion and creative industries) will be summarised and critiqued using a thematic and content analytical framework.* Other relevant sustainability information in the public domain in South Africa, regionally and beyond was also reviewed. These documents included annual reports, sustainability reports, press releases and social media pages in South Africa, global locations, and other centres of the fashion industry.

It was useful and insightful to review sustainability initiatives in countries across Europe as well as in other regions that have led the way in the sustainability discourse. H&M, a Swedish based clothing chain, has retail operations in South Africa and has a very evidently promoted sustainability focus with ongoing waste management and recycling initiatives and even TV advertising that speaks to its intention to be seen as a frontrunner in sustainability. Only documents available to the public available on company websites, i.e., annual reports, press releases, articles etc were used to conduct document analysis.

Social media pages of key fashion centred organisations were analysed to give additional consumer information to support the results from the 6 interviews.

3.6 Methodological considerations – Implications

Despite pandemic-induced setbacks the gathering of data and implementation of the research plan went fairly well overall, requiring flexibility, adaptability, and persistence at every turn. The carrying out of data collection during a pandemic may have been a downside to the study and the experience of the PhD experience of the researcher but overall, even with the largely online, telephonic, and remote study the depth of engagement with respondents was to me a very definite highlight of my PhD experience. Some respondents went above and beyond my expectations as they willingly allowed scrutiny of their business model despite the torrid pandemic which left them in an uncertain and challenging environment and perhaps even facing bankruptcy concerns. Data collection was challenging but it was the highlight of my PhD research experience and gave me the impetus to move forward despite less-than-ideal conditions.

3.7 Ethical considerations

Ethical clearance was obtained for the study and when the study was changed to an online study mainly ethical clearance was obtained to proceed with the study. Participants were not coerced in any way to participate in the study and had the option to opt out of the study.

CHAPTER FOUR

Tracing the emergence of the small-scale fashion sector

4.1 Introduction

The South African fashion industry continues to exhibit visible dynamism and innovation post-apartheid with changing formats and the rejuvenation and development of retail precincts and retail forms in a very evident way. Small-scale independent fashion designers have changed the landscape of the South African fashion industry in a very evident way and have in recent years grown to be a formidable sector within the larger clothing and textiles sector, spearheaded by young designers eager to make their mark in the industry (Smal, 2016). Renowned South African fashion designers like Sun Goddess, David Tlale, Marianne Fassler, Wandile Zondo, Rich Mnisi, Gert Johan Coetzee and Palesa Mokubung have gained a strong following and recognition locally. They have also managed to penetrate the global market, showcasing at international fashion events such as New York Fashion Week and Paris Fashion Week. In this chapter, the emergence of small-scale independent fashion designers as significant players in the clothing and textiles industry in South Africa is explored in a review of key developments that have shaped the trajectory of the industry. The clothing and textiles sector in South Africa has had a tumultuous trajectory which has often been shaped by historically landmark periods such as the upheaval of the apartheid era as well as globalisation, economic forces and policies that regulate the way the industry operates globally and locally (Rogerson, Morris & Barnes, 2014).

Independent fashion designers operating in a small-scale manner throughout the country are recognised as key players in South Africa's creative economy and an evolving SME sector within the larger clothing and textiles industry with economic significance. Their growing visibility and participation in the larger clothing and textile sector in South Africa is apparent, particularly in the urban centres. While their retail stores are usually small, they are increasingly visible and prominent in urban retail spaces and have emerged as a sector of significance in the clothing and textiles industry in South Africa with entrepreneurial flair and creative dynamism.

In the post-apartheid era, the clothing and textiles sector is a government policy priority area, generating significant employment and contributing to the creative economy (Rogerson, 2006). In recent decades, policy attention and research focus regarding the potential and impact of the creative industries has increased (Adebola-Oyekunle, 2017). Oyekunle & Sirayi (2018) make a strong case for greater policy focus and strategic interventions to raise the profile of the creative industries in South Africa as well as to harness opportunities and address barriers and impediments to the incorporation of the creative economy in South Africa's economic development strategy. The sector has faced fierce competition and operational challenges that have been detrimental to the industry (Creative South Africa 1998; Creative industry sector report, 2008; Adebola-Oyekunle, 2017).

In this chapter key characteristics of the clothing and textiles industry in the apartheid era as well as developments in the clothing and textiles sector post-apartheid and in recent years are analytically reviewed and their implications assessed regarding the direction and possible future trajectory of the industry**.**

4.2 The South African clothing and textiles industry in the apartheid era

The clothing and textiles industry in South Africa has undergone several key transformations over the past decades (Vlok, 2006; Rogerson, 2004; 2006). The organisation and operation of the sector was markedly different in the apartheid era. The South African clothing and textiles industry was protected by high tariffs and import substitution policies during the apartheid years (van der Westhuizen, 2006). There is little published in academic research and popular press on the fashion industry before apartheid, but it is very likely that there was a thriving fashion industry perhaps based on cultural or ethnic preferences and organised differently regionally. In the apartheid era, the industry thrived but in an industry protected environment that was driven by domestic regional demand (Rogerson, 2000). The clothing and textiles industry in South Africa was vibrant and focused exclusively on the local market creating a very insular inward focused industry (van der Westhuizen, 2006). The fashion industry in South Africa thrived during those years serving the domestic market as it was protected from international and regional competition. After the apartheid government collapsed South Africa joined the World Trade Organisation and agreed to trade liberalisation under the General Agreement on Tariffs and Trade (GATT) (Vlok, 2006). The apartheid regime had an active policy of import substitution, thus actively nurturing local sectors and they also had a policy of consolidating white / Afrikaans capital accumulation. The textile sector was one such sector in which consolidation was encouraged, instead of supporting small-scale producers and particularly because the small operators were normally black or Indian producers. Small-scale producers and sectors in the fashion industry were actively undermined during the apartheid era leading to a skewed industry largely comprising large clothing and textiles producers with a distinctly biased positioning and an ability to influence the industry's direction.

4.3 The South African clothing and textile industry post-apartheid

The clothing and textiles industry has struggled in the post-apartheid era. After the fall of the apartheid regime, the clothing and textiles industry was driven to the brink of collapse and teetered precariously on liquidation and bankruptcy. After the fall of apartheid, the removal of subsidies and import tariffs led to the collapse of the sector in the 1990s. The sector had been dominated by uncompetitive monopolies who survived on government subsidy. When the subsidies and import tariffs were taken away, the sector collapsed. Had small scale producers been supported and encouraged perhaps the sector would have perhaps been more resilient.

It was anticipated that the clothing and textiles industry would be decimated by the liberalisation of markets (Truett & Truett, 2010) and to a greater extent that has been the case. Morris & Reed (2008:8) succinctly point out the difficulties that have faced the clothing and textiles industry in South Africa.

> The SA clothing and textiles industry have undergone difficult restructuring over the past 10 years due to the combined impact of domestic and international factors. The negative impact of the transformation is manifest in declining contribution of the sector to total manufacturing output, its falling export share and significant contraction in sector employment.

The industry did not thrive in the post-apartheid dispensation and the issue of global competitiveness plagued the industry. The struggles around global competitiveness and the influx of imports has been the defining struggle of the fashion industry in South Africa post-apartheid as it has faced stiff competition from Asia in particular. Policies that have developed to face this challenge have often focused too much on removing the threat that international trade presents rather than seeing it as an opportunity (Morris & Reed, 2008).

The clothing and textiles sector in South Africa has faced a torrid transition from the protectionism of the apartheid era to the liberalism of the global market struggling to effectively compete, resulting in catastrophic effects to the growth and trajectory of the industry. Morris & Barnes (2014: 9) describe the nature of the fashion industry during the apartheid years and the tariff changes that have occurred post-apartheid.

> Until the mid-1990s the garment and textile sector was locked into import substituting industrialisation with firms protected by an almost impenetrable thicket of targeted import quotas and high, product specific tariffs. In 1994 the government initiated a radical garment tariff phase down agreement which saw the elimination of import quotas, a movement to a more uniform tariff structure and a major reduction

in nominal tariffs. By 2001, tariffs on textiles were down to 28% and tariffs on garments down to 40%.

The contribution of the clothing and textiles sector to employment has steadily decreased post-apartheid and is likely to decrease further as the pandemic ravages the sector. The clothing and textile sector in South Africa provides much-needed jobs in a country where levels of unemployment are concerning. There has been a steady decline in the economic contribution of the clothing and textiles industry in most of the segments that comprise the industry in South Africa. In its heyday, the clothing and textiles industry contributed over 200 000 jobs to the South African economy, but these jobs have been decimated as the effects of trade liberalisation plunder the sector (Jennings, 2011). Job losses in the fashion industry are a policy concern for the South African government and efforts to safeguard this sector are ongoing.

The textile industry has faced competition from the Asian market and has weathered difficult trading conditions. From 2001 to 2006 there was a decline in employment and production output for the textile industry as shown in the table below. Imports have had a devastating effect on the industry and rose from 77 000 tons in 2001 to 99 000 tons in 2006. The exchange rate affects the competitiveness of the sector (Morris & Reed, 2008). While some of the references are outdated there has not been much research on this sector during this period.

	2001	**2002**	**2003**	**2004**	**2005**	**2006**
Volume of production	103.1	111.7	98.8	101.3	92.8	92.3
Sale R' billion	16.9	20.4	19.2	19.7	19.0	18.4
Employment ('000)	64.1	65.5	70.5	61.7	52.8	50.5
Imports (R' Billion)	5.2	6.9	5.9	6.5	6.4	6.9
Exports (R'Billion)	3.4	4.5	3.8	3.2	3.2	3.1

Table 4.1: Production output and Sales revenue for the Textile Industry (2001 - 2006), Source – *Textile Federation of South Africa*

More recently, the same trend has been observed. In 2013, the clothing, textiles, footwear, and leather industry (CTFL) contributed 8% to GDP and contributed 60000 to 80000 jobs which reflected a decline from preceding years (Business Partners, 2014). The clothing industry in 2013 was the second largest source of tax revenue and accounted for about 14% of manufacturing employment but this has been declining over the years as the industry has struggled to compete with Asian imports, particularly those from China. While the dominantly prevailing view is that China has been predatory to the global economy and decimated local industries, there is also a view that many countries have benefited from trading with China. China has helped countries strengthen their infrastructure and aided technological and skills advancement (Global Times, 2013, cited in Bonga-Bonga & Biyase, 2019).

In 2018, the CTFL accounted for about 2.5% of South African manufacturing output. In 2018 according to SARS there were 4500 tax paying CTFL in South Africa with the majority being microenterprises. Additionally, according to StatsSA the 20 largest companies control about 85% of the wider CTFL market. There has definitely been a decline in the production output in the clothing and textiles sector in recent years.

4.4 Recent developments in the clothing and textiles industry in South Africa

In recent years, the clothing and textiles industry has shown creative dynamism but has struggled to thrive due to the influx of fast fashion garments from China. The ongoing profitability issues plaguing one of South Africa's leading fashion retailers signals a fashion and clothing industry in distress. While there have been very evident struggles in the clothing and textiles sector recently there has also emerged a distinct creativity and artistry which continues to evolve. Rogerson (2006) draws particular focus to the dynamism, vibrancy and creative diversity emerging in the South African fashion design industry where a distinctly race based growth trajectory has developed. While there are designers of varying races appearing in the sector and taking advantage of entrepreneurial opportunities, there has also been an evident influx of black South Africans into the fashion industry (Rogerson, 2006). Many of the black entrepreneurs in the fashion industry began their businesses in their homes and largely in the townships, before moving to premises in the inner city (Rogerson, 2006).

The fashion industry in South Africa is a government policy priority as it impacts the livelihoods of a significant percentage of the population, particularly those who were previously disadvantaged in their access to education and access to opportunities for employment (Pather, 2015). Unemployment has reached an all-time high in the COVID- 19 era with millions seeking employment as the job market shrinks. In a recent Bloomberg report South Africa was identified as the country with the highest unemployment rate in a list of 82 countries (Bloomberg, 2021). The unemployment rate increased to 34.4% in the second quarter of 2021, up from 32.3% in the first quarter of the year (Bloomberg, 2021). In South Africa, before the fashion industry began to decline post-apartheid and liberalisation of the economy, the clothing and textiles industry contributed 200 000 jobs and generated over R20 billion in revenue and developments in African fashion have also been aided by a rapid increase in telecommunications (Jennings, 2011).

In terms of the spatial organisation and distribution of the industry provincially, the South African clothing and textiles industry is concentrated in the Western Cape, KwaZulu Natal and Gauteng as well as the Free State. Cities such as Cape Town, Durban and Johannesburg play an important role and the rural areas are also part of the clothing and textiles industry to a smaller degree (Vlok, 2006). There are a large number of cut-make-trim (CMT) operators in the Western Cape and KwaZulu-Natal that range from large well-established firms to small home industries and the informal economy plays a key part in this industry (Barnes, 2005). Pather (2015: 57) describes the clothing, textiles, and fashion industry in South Africa as 'highly diverse in nature and comprise of a combination of both inexpensive, mass-produced basics and higher, valued added fashion and tailored garments from specialised textiles.' It is hard to determine the number of companies in the clothing and textile industry in South Africa because of the informal nature of the clothing industry in particular and operations can be set up anywhere (Vlok, 2006). The concentration of the clothing and textiles industry in urban areas in South Africa exhibits a particular spatial pattern that has its roots in the apartheid era where urban areas play a pivotal role and are the sites of emergent designers seeking visibility and still building brand recognition. The predominant location of the fashion industry in large urban areas is similar to trends observed across Africa where cities have become the site of vibrant fashion hubs and fashion focused developments concentrated in the urban areas (Langevang, 2016). Efforts to locate fashion factories in the rural areas in South Africa were largely unsuccessful.

The South African clothing industry is constantly evolving responding to domestic and international patterns. The structure of the industry has changed as new formats for retail shops and the entering of foreign shops has changed the industry. Morris & Reed (2008) point out that similar to the international environment, South Africa's clothing industry is dominated by a small number of large retailers with head offices in Cape Town wielding considerable value-added fashion and tailored garments. The dominance of the large retail shops is declining, and the rise of online shopping has changed the landscape of the retail industry, and some have had to change their formats and even close down. The advent of the COVID-19 pandemic will undoubtedly leave the fashion industry changed as global events unfold. The COVID-19 era has adversely affected the fashion industry in South Africa although it has speeded up technological and digital development. Lockdown restrictions forced the industry to develop a stronger digital presence switching to online shops and other innovative ways of selling their wares. As lockdown restrictions are eased and customers return to the stores, there are ongoing changes to the way that businesses operate that may have a lasting effect but currently the industry is grappling with rebuilding what used to be a vibrant industry in the wake of the COVID- 19 pandemic.

The ownership structure of the South African fashion industry has changed over the years. Most established larger businesses are still owned by white people (Vlok, 2006) but this continues to change with the rise in ownership by black people. A significant proportion of small and medium sized businesses particularly in the clothing industry are owned by black people especially in Durban and its townships and Cape Town and its townships (Vlok, 2006). Workers in the sector consist mainly of blue-collar workers.

The domestic consumer market has evolved over the years catering for diverse income groups. The rising black middle class has changed the industry and introduced a significant market to the fashion industry although economic woes have put the black middle class under pressure recently with rising debt and other inflationary and economic pressures. The advent of the COVID- 19 era has worsened the situation. According to the Bureau of Market Research at the University of South Africa, South African households spent an average of 5.3% of monthly income on clothing and fashion in 2014 and the trend conscious nature of the South African consumer was a big contributor (Flanders Investment & Trade, 2016).

In the post-apartheid era, the rise of online shopping has also changed the way the industry operates and forced many retailers to implement a digital strategy. A report by the global accounting firm, PriceWaterhouse Coopers (PWC) before the onset of the COVID- 19 pandemic revealed that South Africa was lagging behind in the rate of digitisation (PriceWaterhouseCoopers, 2018). The report highlighted that while companies in the Emerging Markets and Africa (EMEA) regions were adopting digital trends, they were often lacking in automation and connectivity in their manufacturing sectors (PriceWaterhouseCoopers, 2018).

On a global level and with impact on the clothing and textile industry in South Africa, the balance of power in the global fashion industry has shifted towards the east. Post-apartheid, the surge in imports from China has been devastating to the fashion industry and imports have dominated local markets. The rise of China as a significant player in the world economy has disrupted the fashion industries of many countries including South Africa. China joined the World Trade Organisation in 2001 and there began the dominance of China in the clothing and textiles sector. China has an aggressive export strategy and Chinese products can be found all over the world. Cheap clothing from China have threatened industries in many markets dominating and bringing a wave of Chinese influence across the globe that has often been controversial. Between 1979 and 2013, China enjoyed a period of rapid economic growth largely due to as a result of foreign trade and rising investment (World Bank, 2014, cited in Bonga-Bonga & Biyase, 2019). The global dominance of Chinese clothing exports has also included a fall in the unit price of garments. Chinese textile exports increased from $7.2 billion in 1990 to $48.7 billion in 2006. Its share of the world trebled from 7% in 1990 to 22% in 2007 (Morris & Einhorn, 2008) and including Hong Kong. China's share increased to 28.7% of global textile exports.

The South African clothing and textiles industry has been impacted by the increasingly global nature of the industry. Globalization has played a vital role in the way the clothing and textile industry has operated and the clothing and textiles industry in sub-Saharan Africa has been greatly impacted and driven by the emergence of global value chains (Morris & Barnes, 2008). The advent of global value chains has created a distinctive model of operation of the fashion industry that has been a defining characteristic of how the global fashion industry has evolved. These 'networks of production, distribution and marketing' have underpinned the global nature of the industry in formative ways but have often been prejudicial to developing countries, frequently raising social justice concerns (Gibbon

2003b:1811 cited in Morris & Barnes, 2008:1). Social justice concerns impacting the fashion industry have increased in the COVID- 19 era (Urminova & Kusa, 2020**).**

Global value chains (GVC) bringing diverse players together and global production networks (GPN) have been formative to the way markets and firms have interacted (Neilson et al., 2014) in a globalised world. In many ways, global value chains have become the 'world economy's backbone and central nervous system' (World Economic Forum, 2012:4). China plays a key role in global value chains in manufacturing, especially in labour-intensive sectors (World Economic Forum, 2012). **Figure 4.1** highlights some of the key trends that have emerged in a global value chain driven world with China playing a leading role in the manufacturing sector and also in the global fashion industry (World Economic Forum, 2012). The impact of South Africa's weak position in the value chain and its reliance on the domestic market has been felt as consumer spending dropped in the pandemic era.

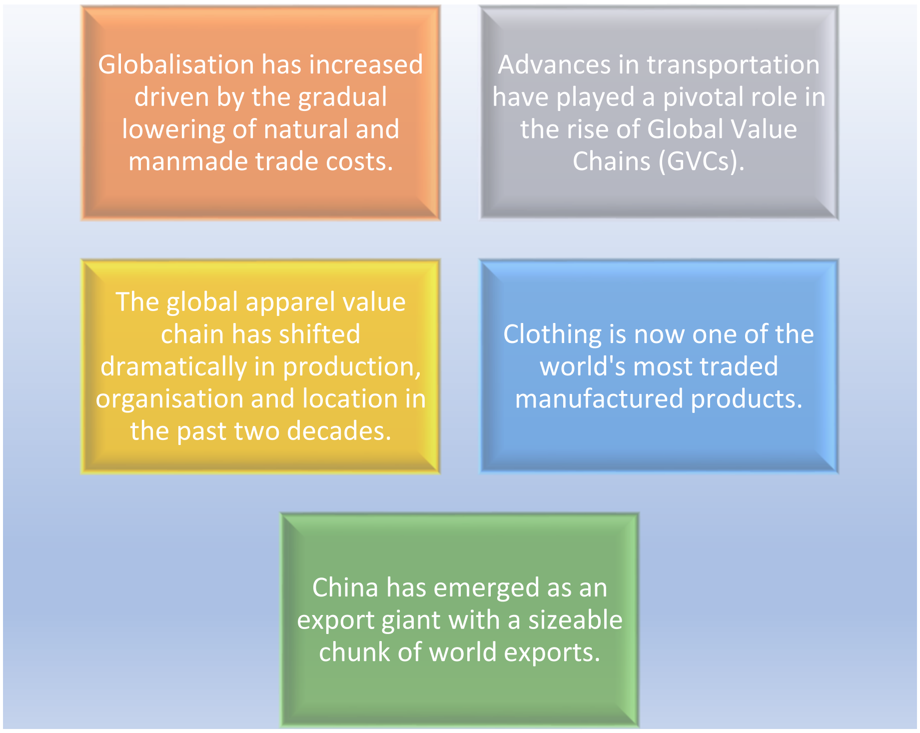


Figure 4.1: Trends in globalisation and global value chain development impacting the fashion industry, Source: World Economic Forum: 2012

4.5 Recent trends in the South African designer fashion sector

A recent study which appears to be the first study of its kind in South Africa on the designer fashion sector revealed recent trends and the size and economic performance of the designer fashion sector. The study entitled, *Assessing the Economic Value of the Designer Fashion Sector in South Africa* which was the result of a collaboration between the Department of Trade and Industry and the South African Cotton Cluster revealed that South African fashion designers contributed at least R1 billion to GDP in 2019 and are poised to take advantage of opportunities in the market segment although there are real challenges as well (DTI & SCC, 2020). Fashion designers are seen as a subset of the clothing industry and while still a relatively small market consisting of small-scale producers are growing in importance. Designers have substantial growth opportunities within an evolving local middle-class market estimated to target the growing middle class of South Africa and the rise of slow fashion (DTI & SCC, 2020). The slow fashion market segment presents an opportunity for designers as well as the growing upper middle class of South Africa. Sustainability has become a buzzword globally. The rising popularity of sustainability also presents an opportunity for designers in South Africa. Slow fashion is defined as a more conscious and deliberate approach to the fashion industry in which small scale responsibly produced apparel is favoured. According to the study, designers employed an average of 6 employees per company and the South African textiles industry has 622 designers. There are also real challenges in the design sector and designers tend to struggle in their early years while living hand to mouth developing their brands. Major international opportunities exist for international designers, especially with the increased focus on sustainability. While there has been international presence, there is the opportunity for a more meaningful presence in the global fashion markets.

The study revealed interesting trends regarding the economic performance of the sector as revealed in **Table 4.2**.

	Less than R5 Million Turnover	R5M to R10M Turnover	R1O to R15M Turnover	Greater than R20M Turnover
Total % of Interviewed Designers	**92%**	**4%**	**2%**	**2%**
Average years in business	**2.2 YEARS**	**6.4 YEARS**	**15 YEARS**	**37 YEARS**
Core Category	**Accessories and Women's wear**	**Accessories and Women's wear**	**Men's and Women's Wear**	**Accessories and Women's Wear**
Typical Business Description	**Design and Production**	**Design and Production**	**Design and Production**	**Design and Production**
Typical Core Competency	**Design**	**Design and Fabric Sourcing**	**Design and Development of Collections**	**Design and Development of Collections**
Average Number of Units produced per week	**194 UNITS PER WEEK**	**395 UNITS PER WEEK**	**70 UNITS PER WEEK**	**23K UNITS PER WEEK**
Typical Channel to Market	**RETAIL/WHOLESALE**	**RETAIL / MADE TO MEASURE**	**RETAIL/WHOLESALE/MADE TO MEASURE**	**RETAIL/WHOLESALE/MADE TO MEASURE**
Average Number of Employees	**5**	**16**	**31**	**33**
Average Turnover	**R740K**	**R6.5 M**	**R11.5 M**	**R 28 M**

Table 4.2 – South African Designer Fashion Sector Turnover and Business Performance, Source: DTI & SACC (2020), page 21

The definition of the designer fashion sector used in the study extended beyond clothing and was defined as *women's wear*, *accessories, men's wear*, *footwear*, and a category named as *other* that fell out of the ambit of the previous categories.

- ✓ The majority of designers in the study reported less than R5 million turnover (92%) annually.
- ✓ Only 2% reported more than R20 million turnover annually.
- ✓ Most of the designers who participated in the study were newcomers to the fashion design business reflecting the way in which the industry has attracted young designers seeking a foothold on the economic ladder.
- ✓ In the post-apartheid dispensation, the clothing industry evolved becoming more inclusive and allowing the entrance of new players especially from previously disadvantaged communities.
- ✓ Designers are focused on clothing and accessories predominantly and the core business of designers is defined as design and production, as well as the development of collections possibly focused on fashion week events that raise the profile of the industry and promote designers globally.
- ✓ The production run/output of designers is also kept to a minimum amount, again highlighting the small- scale nature of fashion design businesses, which as mentioned earlier started as home industries moving to locations outside the home as the business grew.

The organisational structure of fashion design businesses is fairly lean with few employees and possibly owner managed. The study revealed a fashion design sector that has the potential to make a significant contribution to the economy of South Africa. It was revealed in the study that 30% of designers were conducting their own manufacturing. The study also revealed that designers were supplying at least 4 retailers. Sustainability was identified in the study as becoming increasingly important to South African designers. Initiatives that designers are engaged in that are focused on sustainability include the sourcing of sustainable fabrics, the use of natural fibres within and throughout their design and working with suppliers that adhere to sustainable design . The trends emerging from the study shed light on the small-scale independent fashion design sector in recent times clearly illustrating the emergent nature of the industry. Small scale independent fashion designers are carving a niche in the larger textile and clothing industry and have the potential to galvanise entrepreneurship, build the local fashion industry and contribute to the revival of the clothing and textiles industry.

4.6 The changing face of the fashion industry in South Africa

The creative revival of the fashion industry in South Africa post-apartheid has been a key highlight of developments in the creative industry or arts sector. South Africa, has in many ways, led the rejuvenation of the fashion industry on the continent with the revival of the industry post-apartheid, driven by renewed hope and the end of a difficult era bringing a wave of optimism and the birth of a new country and governing ethos (Rogerson, 2004; 2006). The infusion of various South African cultures into designs as well as a modern aesthetic drawing on global trends, infused with a creative edge, is often surprising and unexpected, reflecting a continent and a country's continuous rebirth. The arrival of immigrants from across Africa and beyond to the city of Johannesburg and the rest of South Africa bringing with them their unique design styles and a culture specific approach to fashion design has led to a very mixed aesthetic in the fashion industry in Johannesburg. South African traditional cultural designs are very often intermingled with African ensembles and a modern twist. Indigenous fabrics are still being used but have adapted to the introduction of cheaper industrially made products and imprints of luxury fabrics (Jennings, 2011). The new South African fashion aesthetic has evolved as an intriguing combination of modernity and tradition.

There are a growing number of African designers succeeding in the global fashion arena and the demand for fashion made in Africa has increased (Oberhofer, 2012). African fashion is becoming more and more popular with Africans, and in the diaspora and in international fashion shores. Globalisation has been a key driver of this trend. African models have also risen to greater visibility on the global fashion stage achieving global acclaim from often very humble beginnings in some of Africa’s poorest countries. Renowned supermodels shaping fashion trends in Europe and North America like the iconic Iman from Ethiopia and Alek Wek from Sudan rose from obscurity in Africa to international stardom in the fashion capitals of New York and London. As suggested by Jennings (2011), the rise of African fashion is inextricably linked to its models and muses who have become almost like brand ambassadors for the continent in regions where the perception of Africa and African fashion may be very primitive and distorted. Paco Rabanne and Yves Saint Laurent were among the first to use models of colour as early as the 1960s (Jennings, 2011).

South African fashion brands that have adopted a new design aesthetic modelled on South African cultural heritage but also incorporating modern fashion trends like the renowned fashion brand Stoned Cherrie have achieved global popularity and success. Stoned Cherrie is a South African luxury fashion brand owned by Nkhensani Manganyi and is popular locally and has made inroads into the global market (Jennings, 2011). The brand is very well known in South Africa and has been hailed for its bold creative vision transcending what was previously embodied to be African fashion (Jennings 2011). Since the launch of Stoned Cherrie and other pioneers of this dynamic new wave of artistic and creative fashion inspiration there have been many other fashion brands in South Africa that have arisen to acclaim. These pioneering designers and design houses have paved the way for the fashion industry in South Africa to go global and achieve international success driven by the change in the way African fashion is perceived and its renewed design aesthetic. The new breed of designers with a global outlook have been seen all across the continent. Oberholfer (2012) makes a strong case for the strong emergence of the African fashion industry on the global front based on the juxtaposition of modernity and culture which has infused a distinctly memorable African fashion flavour with an unexpected global twist. As Oberhofer (2012:66) strongly asserts in praise of the changing dynamic of the African fashion industry,

> 'Africa is predominantly associated with traditions of ethnic entities in rural settings. Recently this one-dimensional Eurocentric perception has been contested by a growing number of African fashion designers who are creating contemporary fashion in a cosmopolitan urban context.'

The South African fashion landscape continues to change in many ways. Additionally, the retail formats in the clothing and textiles sector have changed. Large clothing department stores have declined in popularity and struggled to stay afloat. Some have had to close and a move to smaller boutique shops offering a diverse range of apparel. The uniqueness of the South African fashion industry is the diversity of retailers from the large clothing chains to small owner managed and often one room shops in the CBD or other localities. The fashion industry is by no means a ubiquitous sector but one that has the potential to play an even more significant role in the country's economy and globally. Jennings (2015) describes South African fashion as the leading fashion industry in Africa in terms of media, retail culture and fashion week events.

Some South African designers have recently launched eco fashion collections. The renowned designer Craig Jacobs launched *Fundudzi*, a sustainable fashion brand based on ecologically sound principles and made from various fabrics such as corn and bamboo (Bizcommunity, 2016). The number of designers specifically focusing on ecologically friendly fashion lines is still limited. In the main, the general focus on environmentally sustainable fashion brands is a growing sector globally and is now evident in South Africa. The majority of designers operating in South Africa have not yet launched specific eco fashion brands but with the worldwide move to environmentally conscious brands it is likely that they have started to incorporate eco-friendly principles in their garment manufacturing practices and perhaps have certain aspects of their collections incorporate sustainable principles.

4. 7 The rise of eco fashion as an emergent fashion segment

Eco fashion is new to South Africa and is still very limited all across South Africa and the few designers that are focusing on this type of fashion will provide new insights into a very novel area. Insights obtained from designers specifically focusing on sustainable fashion will provide an exploratory assessment of this very new fashion genre. Eco fashion has taken the global fashion industry by storm garnering media interest and endorsements from key influencers in the fashion and creative industries such as celebrities and carving a niche and exclusive identity. It has almost risen to fame in response to the unrelentless onslaught of the fast fashion industry. Eco fashion also known as sustainable fashion has become a new fashion focus, particularly in the global north where it is growing to be the antithesis of the fast fashion industry, in opposition to the widely publicised negative impacts of the meteoric rise of the fast fashion industry. Eco fashion is recognised as a rising segment in the fashion industry although its adoption and influence still pales considerably in comparison to the burgeoning fast fashion industry which shows no real sign of slowing down. Fast fashion has been severely criticised for bringing the industry into disrepute encouraging overconsumption, leading to waste issues, and compromising on elements of garment construction such as longevity and quality. In the less developed world, eco fashion is starting to be noticeable in specialty designer shops and in some larger retail shops like H&M and Woolworths which have publicly advertised their sustainability focus. The opportunity for eco fashion or sustainable fashion to entrench its position as a credible fashion product in South Africa has been studied with some impediments emerging such as the difficulty in obtaining natural or organic fabrics and the expensive nature of the eco fashion manufacturing process. This study engages with eco fashion as an emerging fashion segment and a promising avenue to tackle the adverse impacts of the fashion industry on the environment in the South African context and as a sustainable fashion genre in a country where issues of economic, social and environmental sustainability are a challenge.

4.8 The rise of fashion districts and other nodal centres

The development of the fashion industry or fashion focused precincts in South Africa has taken on an interesting conglomeration where fashion sites have also become centres of cultural production and entertainment or have tended to be close to such sites, particularly in the key fashion cities of Johannesburg, Cape Town, and Durban. The organisation of the fashion industry in South Africa in the various cities has tended to favour a heterogenous conglomeration and there have been key nodes where fashion designers have favoured (Rogerson, 2006). Interestingly in Johannesburg, there are a few locations around the city where designers have tended to conglomerate creating mini fashion and design districts. There are many designers located sporadically in the city's northern suburbs and particular areas/suburbs such as Rosebank, Sandton and Melville have attracted more designers. The Rosebank Design District has become a hub for the design industry including fashion and SA Fashion Week is located in this precinct. Fashion Week Events have raised the profile of the fashion industry across South Africa and are key events on the social calendar of the city.

Local economic development strategies have played a role in the organisation of the fashion industry post-apartheid and the revival of the Johannesburg Fashion District is a pro poor led intervention (Rogerson, 2006) that has the potential to revive and regenerate the district as a distinct fashion precinct. The development is also in line with plans to position Johannesburg as the centre of the fashion Industry in South Africa. The location of the Johannesburg Fashion District in the inner city also raises unique environmental challenges prevalent in inner cities. The creative industries as a whole have been used to reposition

Johannesburg as a vibrant city with developments focused on urban regeneration and a revival of the local clothing economy is one such development. Various initiatives have been used to reposition Johannesburg as a cultural and creative centre.

The Johannesburg Fashion District comprises 1000 clothing enterprises and was aimed at reviving the clothing economy of inner-city Johannesburg (Rogerson, 2006). Cities worldwide have launched urban regeneration initiatives, and these have often included a fashion focused precinct or a fashion district as well as other entertainment and shopping areas bringing vibrancy and an air of casual relaxation in busy cities that often lack green spaces and are limited in the options available to relax outside the built-up office and residential areas. The move away from inner cities to decentralised suburban locations has been observed for many years and is still evident in cities around the world (Rogerson, 2006).

Over the past five years, several initiatives have been launched towards establishing Johannesburg as Africa's fashion capital. Among the most significant of these industries has been the consolidation and upgrading in the inner city of the 'fashion district' an area which has been the growing focus of growing support from the city council of Johannesburg (Rogerson 2006:215).

Congestion, overcrowding, not adhering to space use parameters where residential buildings will sometimes be next to commercial properties has brought on a particular set of challenges impacting environmental conservation in these districts. The creation of the Johannesburg Fashion District was part of a broader initiative aimed at revitalising Johannesburg's inner city (JDA Fashion District Business Plan, 2004). The district comprises suppliers, of fashion products such as equipment, haberdashery, specialist finishing services, transportation providers as well as designers, manufacturers, and sales outlets. The district has a distinctly fashion themed design. The fashion definition espoused in the district is a broad definition that includes a wide range of design related and lifestyle choices such as furniture, décor, and other furnishings. The positioning of the district as the ' Urban Edge of African Fashion' encapsulates the trendsetting ethos envisioned for the district. The district was part of the 2030 Vision for the city of Johannesburg aimed at the city attaining a world class status aspiring for a city that is on par with first world capital cities.

The district has been in existence for a while and the question that lingers is has the district achieved its aim and in what way has this had a bearing on environmental sustainability? A walk through the Fashion District reveals a somewhat muted precinct that has become a bit derelict in parts but there are a number of designers mainly focused on Africa inspired fashion trends probably run by immigrants from across Africa which does produce a somewhat pan African feel to the area. A number of designers have moved from the district to other fashion nodes around the city. Rosebank, in particular, has become a popular home for designers attracting designers focusing on varying fashion genres and is a popular destination. The Rosebank design district is also emerging as a hub for designers and the fashion industry with SA Fashion week located there (**see Figure 4.3).**

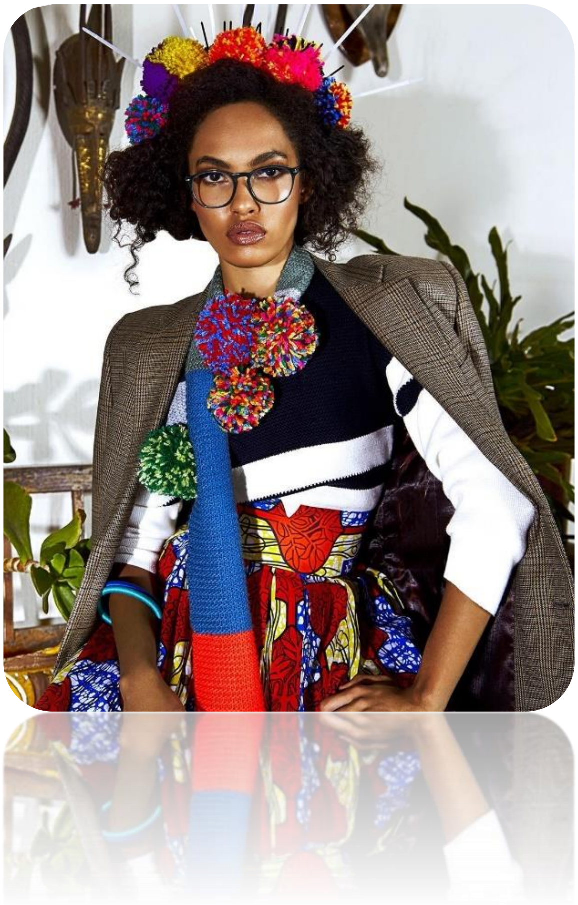


Figure 4.2 : Eclectic South African Design, Source: briefly.co.za

Figure 4.3 : Design District (Rosebank), Source : romalax.com

The Johannesburg Fashion District is a representative microcosm of what is happening across the city's fashion landscape in many ways although its current state veers from the plans that had been made at its inception with a somewhat derelict appearance. The district, beyond attracting fashion designers, has also attracted other fashion related businesses, and has tended to attract largely designers focusing on afro centric designs as well as Asian inspired apparel makers and showcases design excellence and creativity continentally seen in the number of immigrant-inspired fashion businesses in the district (see **Figure 4.2**). The predominantly Afrocentric nature of the Johannesburg Fashion District is somewhat unexpected but not surprising as there has been a move out of the CBD to the northern parts of the city by many industries including the fashion industry.

Cape Town was a significant centre of the fashion industry but like Johannesburg has been significantly impacted by the influx of low-cost Asian imports. Workers in the fashion industry in Cape Town are predominantly women who have faced the brunt of the decline in the market segment. Cape Town was awarded the World Design Capital in 2014 (Design Indaba, 2017) and has been positioned as a centre of creative design in South Africa, including fashion design.

In a 2019 speech, Alderman James Vos, Mayoral Committee for economic opportunities in Cape Town highlighted the plans underway to revive the clothing and textiles sector in Cape Town and drew attention to some salient attributes of the sector (InvestCapeTown, 2019). The speech identified key features of the clothing and textiles sector in Cape Town (InvestCapeTown, 2019). The clothing and textiles sector is a priority sector for the city of Cape Town because of its contribution to exports and employment. The clothing and textiles sector is a significant employer in Cape Town and employs over 23600 individuals (InvestCapeTown, 2019). The clothing and textiles industry contributed to Cape Town exports over 4.4 billion. Similarly, Durban was a significant centre of the fashion industry but has also been impacted by developments post-apartheid and the rise of Asia as a significant competitor.

The clothing and textiles sector in Cape Town while it has plummeted over the years post-apartheid continues to be a key sector reflected by its contribution to employment and exports. Reflecting the fashion industry's strategic importance to the city, there are a number of organisations involved in the fashion industry in Cape Town, including the Cape Town Fashion Council, The Western Cape Clothing and Textile service centre, the Craft and Design Institute and the Cape Clothing and Textile Cluster. The clothing and textiles sector in Cape Town is a mayoral priority.

The clothing and textiles industry in Cape Town is seeking revival in a difficult economic period but there are opportunities that have been identified for the sector that should aid its revival. The fast fashion sector has become increasingly popular as well as the rise of the ethically minded consumer and the industry can capitalise on opportunities in both these market segments. The volatile nature of the fashion industry has led to innovation in the South African Fashion industry and the rise of fast fashion has intensified the competitive landscape of the industry. Fast fashion has taken root in the South African fashion industry with many international fashion brands implementing agile supply chain practices able to stock a variety of collections and thus become more responsive to consumers drawn to the trend driven and affordable collections (Muhwati & Salisbury, 2017). Additionally, local sourcing is being promoted which can help revive the industry particularly in the COVID- 19 era.

4.9 Challenges in the fashion industry in South Africa

The fashion industry in South Africa has faced many challenges and continues to face significant barriers to local and international competitiveness. The industry has faced myriad challenges which have impeded the growth and stability of the industry. Vlok (2006) identified the key competitiveness challenges facing the industry. Investment and technology was identified as needing attention to boost competitiveness and that this has resulted in the majority of the industry focusing on the CMT(Cut, Make and Trim) sector. The need for significant investment in the industry coupled with the requisite technology was identified as critical to the success of the industry. Secondly, the skills base was seen as a challenge and is vital to modern manufacturing. The low levels of education in the black population was also mentioned as a stumbling block to the industry. Vlok (2006) draws attention to the deficiencies in innovation in the fashion industry and that while there was an evident post-apartheid identity in the industry, there was still room for improvement in this aspect of the industry. Innovation and design capacity was also seen as lacking although this may have improved in recent years. Challenges also raised relate to weak value chains, trade distortions, illegal imports, and volatile exchange rates.

More recently at the launch of *Fashionomics,* an initiative to grow the sub-Saharan fashion industry by the African Development Bank, a few challenges in the fashion sector were identified (African Development Bank, 2020). On the continent the fashion sector in Africa has been identified as a critical component in the economic diversification of the continent and the quest for employment creation and the addressing of unemployment challenges on the continent (African Development Bank, 2018). According to the African Development Bank, 'the textile and clothing industry in Africa presents a lot of potential for value added benefits and job creation' and it can be a key driver of Africa's industrial transformation (African Development Bank, 2018). The clothing sector in South Africa has its own unique set of challenges specific to the socio economic and historical profile of the country but faces many of the same problems faced by the clothing sector in many countries in sub-Saharan Africa as outlined below.

- Textile production facilities are missing in many of the countries.
- Small scale producers and designers cannot access industrial production.
- Skills shortage and lack of industry specific skills
- Constrained access to financing for entrepreneurs

Jennings (2015) in her exuberant celebration of African fashion highlights the very real challenges facing the fashion industry in Africa. A key point of weakness in the African fashion industry that she identifies is the lack of fashion training which creates weaknesses throughout the industry including pattern cutting, styling, marketing, and public relations. This weakness may not necessarily apply to South Africa to a significant extent as there is a growing number of fashion schools and a more visible entrenchment of fashion studies as an academic discipline even up to university level with tertiary institutions with dedicated fashion design departments such as the University of Johannesburg. She also pinpoints the lack of a continental body representing the fashion designers as a deficiency preventing unity in the organisation. Furthermore, the infrastructural deficiencies of the industry are also a weakness of the African fashion industry and bureaucracy remains a limitation to trade. The electricity challenges facing South Africa resulting in frequent load shedding and power cuts also pose a challenge to workflow in the manufacturing sector, including the fashion industry. Transport networks and a lack of equipment also pose a challenge to a high potential industry. Jennings (2015) also draws attention to the challenges presented by the influx of imports from China into the African fashion industry as well as the growing second-hand market for clothes fuelled by charity donations from overseas. China has become a dominant player in the fashion industry and cheap imports from China have destabilised local fashion industries across Africa and other regions of the globe. In South Africa, there have been calls from trade unions and non-governmental organisations to restructure trade with China to prevent and halt the decline of the clothing and textiles industry (Bonga-Bonga & Biyase, 2019).

Barnes (2005) identifies challenges in the clothing and textiles sector in South Africa as long lead times, poor delivery reliability and deteriorating quality performances stressing the importance of an efficient, supportive textiles industry to the fashion industry and that without it, the clothing industry expansion is constrained. The problem of a lack of skills in the fashion industry has been raised repeatedly as a major issue in the industry, and an impediment to growth, although over the years there has been a number of skills development initiatives that have sought to address this challenge.

4.10 Eco fashion in South Africa : sustainability hope or not?

While this chapter has engaged with the trajectory of the textile and fashion industry in South Africa in the apartheid era, the post-apartheid era and in recent years, the next chapter will critically assess the views of designers towards eco fashion or sustainable fashion based on the responses of small-scale fashion producers to questions relating to sustainability and the emergence of eco fashion. What will be assessed is the potential for sustainable fashion within South Africa’s particular context and the progress towards sustainability based on the activities and practices of designers in South Africa and how they envisage the sector within a globalised world. Is there hope for sustainability in the fashion industry in South Africa and more specifically what will sustainability look like in the small-scale producer sector? Sustainability globally has shown a somewhat slower rate of adoption than the mass-produced fast fashion segment and what remains to be seen is whether sustainable fashion can make real inroads into the fashion industry as a more environmentally friendly fashion segment. The emergence of eco fashion is against the backdrop of a global fashion industry in rapid flux but which is extremely trend-driven, highly commercialised and premised on the need to make profit, even while predominant garment making practices and processes that drive the fast fashion industry are clearly unsustainable.

4.11 Conclusion

The South African clothing and textiles industry has changed dramatically over the years since the end of apartheid. There have been many positive innovative and technological developments as well as the rise of a new design artistry representing the new South Africa. The rise of small-scale design houses focusing on indigenous designs infused with present-day designs has also been one of the positive developments and identifying features of the industry in the post-apartheid era. There have been very worthy initiatives to revive the sector and more clearly define a role for the industry in the creative sector. On a less positive note, the contribution of the fashion industry to GDP has declined in the post-apartheid era and so has contribution to employment. Fierce competition in a globalised world has left the South African fashion industry floundering in a number of ways, particularly with the dominance of China as a formidable player in the clothing and textiles sector. Retail formats continue to evolve in response to international trends and local preferences, leaving many retailers having to reposition and rethink their strategies in an ever-evolving marketplace. The department store has been a casualty of the change in retail formats in the fashion industry and a number of key South African fashion retailers such as the much-loved Stuttafords which had operated for many years have struggled and some have closed down. The rise of eco fashion is a new development in South Africa as pressure to safeguard the environment mounts. While only a few designers have specific eco collections, a growing sustainability awareness and interest has certainly been noted. COVID- While eco fashion has emerged in the small-scale designers quite markedly it has had a focus on individual and bespoke ensembles while in the large fashion segment has been a more mass market and therefore not as unique and there has been a slow trajectory in this market segment.

COVID- 19 now poses a risk to the growth and development of the clothing and textiles sector posing more challenges to a sector that has faced real viability pressures in recent years.

It is expected that recessionary conditions will prevail post COVID- 19 and already the fashion industry is seeing ways to recover after a difficult 2020. Various ways and plans to work with government to safeguard one of the nation's key industries are underway. Small-scale designers are not homogenous in any way and their unique localities and success levels have positioned them differently for the future. The profitability and viability levels of South African fashion designers varies. There are many designers who are barely making ends meet as well as established designers who have become household names and carving out a name for themselves internationally. Fashion designers like David Tlale, and Vanya and Thando Mangaliso of Sun Goddess are known countrywide, while a lone designer working in the Johannesburg CBD may only be known by their particular niche clientele. The differing and evolving nature of the South African fashion sector is ongoing and micro enterprises consist of a large proportion of the players in the clothing and textile industries.

The sudden advent of the COVID-19 pandemic has cast a leery shadow on the viability of the fashion industry as wages are cut and furloughs and closures threaten the long-term viability of the industry, placing livelihoods in the industry in jeopardy. Sustainability has certainly come on the radar of the local fashion industry and the switch to slow fashion has been raised as an opportunity for designers in South Africa, although the dominance of the fast fashion industry is clearly evident. Fast fashion has been more dominant across the global fashion landscape and while it has adverse environmental impacts and presents particular competitive challenges to local fashion industries, it may also present opportunities for designers to switch focus, especially those struggling in the COVID- 19 era.

CHAPTER FIVE

Emergent paradigms of sustainability in the small-scale designer fashion sector

5.1 Introduction

The key aim of this chapter is to examine the extent to which small scale producers engage with discourses of sustainability in their own processes. The chapter consists primarily of an analysis of email surveys with six small-scale independent designers based in Johannesburg and Cape Town as well as online surveys and interviews with some key institutions in the sector that support or promote small scale producers in South Africa.

5.2 Sustainability in the small scale fashion sector: presentation of survey results

In this section an examination of the approach to sustainability of designers who participated in the study is analysed reviewing their approach and activities around environmental sustainability with the aim of assessing the extent to which they have incorporated sustainable business practices into their operations. The literature review in Chapter two firmly positioned sustainability as a global influence and while still beginning on the African continent, there are pockets of influence emerging. South Africa is in many ways the centre of the African fashion industry, driving trends and initiatives that cascade throughout the continent, although the west African and east African regions have also been trendsetting. The deficiencies in environmental sustainability in the fashion industry have been a longstanding criticism of the industry as the impacts of the industry on the environment is scrutinized. There has been a global shift towards sustainability evident in many regions and a body of sustainability focused research mainly from the east and from the more developed regions of the globe. Countries like India, Malaysia, Singapore, and China have been key centres of research.

In South Africa, there is an interest in research into the relationship between the fashion industry and the environment (see Smal, 2008; Smal, 2016), but it remains limited. The predominant focus in assessing sustainability alignment of the designers analysed in this study is an overall assessment of sustainability focus and to document ways in which small scale producers are engaging with sustainability. The designers analysed are small fashion design businesses operating in a niche, formal and small-scale manner but with reach throughout the country and may even export to regional and global markets. The impact of SA Fashion Week and other industry showcasing events has led to enhanced global and regional visibility of small fashion brands. Fashion designers like Thula Sindi and Black Coffee and many more have achieved local and global success. Their success has included achieving global brand recognition and participating in international fashion week events like New York Fashion Week and Paris Fashion Week. They have also become household names throughout South Africa.

The six designers analysed in this chapter are from South Africa's two leading cities, Cape Town, and Johannesburg, and will provide regional variations on their approach to sustainability. Cape Town is a centre of creativity and design and the responses from Cape Town reveal insights into the state of the fashion industry in that market. The holiday nature of the city and more relaxed image of the city was shown in the skewing towards summer wear and more relaxed apparel while Johannesburg based designers seem to have a more formal and less casual approach to their design ethos, perhaps the city is seen as more of a business centre and a commercial centre. The businesses interviewed are small scale fashion design businesses with their creative inspiration varying but all appear to run businesses that operate in an efficient and professional manner, although small. The ongoing viability issues presented by the COVID- 19 pandemic remain a threat to all fashion businesses, especially as their operations face a real viability threat in a season where shopping has shifted online, demand has declined, and consumers face financial pressures (McIntosh, 2020).

The data presented regarding the designers and their environmental focus and sustainability initiatives was obtained from email surveys, telephone interviews and the websites of the designers who agreed to participate. Over 70 email surveys were sent from a list obtained from the SA Fashion Week handbook but only 6 were returned despite numerous attempts to elicit responses from other designers. The uncertainty around the COVID-19 pandemic may explain the low response rate when the email survey was conducted in early 2020 and when lockdown restrictions prevented business activities. The designers who responded provided useful insights and very creative initiatives relating to sustainability initiatives within their own businesses. One particular designer was extremely willing to participate in the study and willingly shared strategies and focus areas for achieving sustainability in her business. The designer profiles are analysed without the names of the designers to protect the anonymity and confidentiality of the designers.

The following section presents an analysis of the responses of the designers to key questions from their responses to an online email survey, telephone interviews as well as information gleaned from their websites.

5.2.1 Introducing the six designers and their backgrounds

Six designers (informants) responded to the online email survey and subsequent telephone and WhatsApp interviews carried out in June and July 2020. The designers' profiles are very diverse ranging from small scale producers who have been in the industry for less than five years to fairly seasoned small-scale producers who have been in the industry for more than 10 years. Male and female designers responded to the research questions and all the designers interviewed while acknowledging the challenges they encounter were generally upbeat about the industry. The designers in the study sample are from Cape Town and Johannesburg which perhaps indicates that these are the major nodes of the fashion industry in South Africa and where the majority of the designers are located, or this could have been merely coincidental. An example of one of the informants interviewed is a cape town-based fashion designer who recently moved to Vancouver and with a long history in the fashion industry in South Africa. This designer launched a streetwear focused brand in 2004 driven by a creative vision influenced by the popularity of arcade games during the apartheid era. The designer has remained true to these design and creative roots remaining focused on a design approach/philosophy that seeks to bring a casual yet very streetwear focused aesthetic with a youth market focus.

5.2.2 A glimpse into the designers' product range and target market

The sheer assortment in design in the focus of the designers interviewed speaks of an industry that is rooted in the continual aspiration for distinctively unique design. The designers' product ranges were extremely varied ranging from casually focused streetwear to relaxing summer wear and distinctive resort wear to bespoke formal wear and intricate handmade garments to oriental kimono inspired ensembles with a westernised twist. There is clearly immense variety in the type of garments made by small-scale producers but what is also very apparent is the meticulous attention to individual garment construction and resolute attention to design detail of the designers as well as the evidently small-scale nature of their production operations as well as real and marked variability in the creative artistry of each designer. While there is similarity in the size and approach to garment construction by the designers interviewed there is also real diversity in product offerings creating a very heterogenous sector with many options available to the consumer. Creative design inspiration is drawn widely as each individual designer has a specific design artistry and aesthetic focus drawing design inspiration from diverse sources such as nature, travel, culture, global developments, media etc. In this market segment there is a real focus on making unique apparel with a distinct brand identity for each brand which may be similar to another brand but always seeking for a distinctive aspect. The evident focus on individual garment construction often made to customer specifications allows a slower fashion approach to garment making that is quality focused and with unique apparel. This approach to garment making steers away from the mass market process of garment making which characterises the widely criticised fast fashion approach which mass produces clothing based on trends on the world's fashion runways but compromising on quality and longevity. The more deliberately slow and individually constructed approach to garment making by small scale producers is more likely to be more sustainability oriented rather than the fast fashion mass market approach. Fabrics in a slow fashion approach to garment making are chosen for their durability and longevity and there is an emphasis on quality rather than quantity in garment making.

The sheer diversity in the positioning of the six brands is clearly evident with very definite creative innovation and dynamism and a fresh youthful approach to garment construction. While there is evident variability in the market segments targeted by individual designers there is a very definite focus on the younger and more youthful age ranges and perhaps this reflects the youthfulness of the designers who are focusing on the under 50 age groups mainly. The small-scale producer market has positioned itself in a very forward thinking and youthful manner steering away from an older market but seeking to infuse bold design choices and an innovative flair into the industry. The small-scale producer market has been flooded by young designers, many of whom have been trained in the growing numbers of fashion schools in South Africa. The retail price of the garments made by some of the designers also shows that they are focusing more on the upper end consumer who can afford to pay higher prices for bespoke garments. One designer indicated that her garments were aimed at the consumer that could afford to pay R1000 and upwards for a garment.

5.2.3 Designers philosophy and focus on sustainability

The key focus on the study is environmental sustainability. It is clear from the designers (informants) interviewed that the road to environmental sustainability in the small-scale producer market will not be easy although it is also clear that designers are very keen to explore and find creative ways to incorporate sustainable aspects in their practices and processes. All of the designers interviewed are aware of the importance of environmental factors in the fashion industry but highlighted the marketing and operational impediments and limitations encountered when launching eco-friendly brands in the South African context citing a lack of interest by consumers and the costs involved in constructing garments using eco-friendly principles. Issues concerning the environment are very important to the majority of the designers suggesting that they are actively considering the importance of addressing environmental factors in garment construction. It is also clear that environmental factors are not the primary driver of any of the designer's garment construction philosophy but is certainly on their radar. What is also evident is that environmental factors are less important to their target consumers according to the designers which may explain why some designers do not focus on designing environmentally friendly collections and indicates that other factors like pricing, style and fit may be more important to the consumers of particular brands. What is clear is that from the consumer perspective there is a different hierarchy of importance to the factors influencing purchasing behaviour and the key aspects influencing purchasing decisions. The message of environmental conservation and considering environmental factors has reached the consumer to some degree as indicated by the responses of the designers but is still not top of mind in terms of their choices regarding clothing purchases according to the designers interviewed. The price sensitive nature of the South African consumer was highlighted by the designers interviewed.

The definition of sustainability that seems to be adopted by the designers also has a focus on the social aspects of sustainability and focusing on uplifting and empowering the community and this entails the use of local artisans and a focus on sourcing fabrics locally to promote the local textile industry. This local market focus was highlighted by informant A from Cape Town who stated, "*Living in South Africa, a huge part of being environmentally* *friendly is producing locally – creating jobs and supporting our local economy, rather than importing cheap products from China or India. We are proud to note that we print fabrics locally and produce 100% of our garments here in Cape Town with small local teams of artisans.* In the COVID- 19 era local workers will have felt the pinch as designers reduce production highlighting the precarious nature of their position in the value chain. An issue relating to sustainability practices that emerged repeatedly is the difficulty in sourcing organic or natural fabrics for garment construction in South Africa and this was stated as a major impediment in the quest for sustainability. There is little use of organic or natural fabrics in garment construction by most of the designers hampered largely by the high cost of sustainable fabric as well as the limited number of outlets that sell sustainable fabrics. In the words of Informant B from Johannesburg, *"I buy from the wholesalers and fabric stores around. My business is small and access to organically grown, and ethically manufactured fabric suppliers is a massive challenge because I do not buy in bulk. We produce small unit counts in a slow manner and run the business with a very small team. I am only in control of the garment manufacturing end of this process, the fabric is still a problem. We already have limited access to natural fibres, if the fabric wholesalers offered organically grown goods I would definitely consider buying into that. We do not get fabric made exclusively for the brand, like most overseas brands we basically buy "dead stock" that fabrics stores have piled up.. I honestly don't know if the South African consumer makes their purchase decisions based only on sustainable brand ethics or if it's just about price sensitive options.'*

Most of the designers use synthetic fabrics imported from Asia in garment construction and sold by fabric suppliers in and around their cities, particularly in the popular fabric wholesalers. The use of dyes and other harmful chemicals by designers is limited in their own production processes and this aspect of sustainability is not a major consideration for the designers given that they do not make their own fabrics. One informant assumed that the wholesaler where he purchases the fabrics had stated that they did not use chemicals and dyes and regarding the fabrics used to construct the garments, he pointed out that he made his garments using synthetic fabrics.

In the words of Informant C from Cape Town,

I use some synthetic fabrics from wholesalers that import from Asia, and I have no idea of the conditions or processes they use to produce other than that the wholesaler claims that no harmful dyes are used. They do supply major chains in SA, so I assume they meet testing standards. Informant D from Johannesburg highlighted interestingly that the use of fabrics that use a lot of dyes and chemicals had slowed down in the fashion industry but that this was not the case in the menswear ranges. In the exact words of Informant D from Johannesburg.

'Yes, the impact of natural fibres and ongoing shifts towards sustainable fabrics shape the direction in fashion season, as we are on summer/spring2020 to autumn/winter2021. Though tie-dye begins to slow down and evolve in womenswear, the opposite can be said for menswear. Every iteration of the hyped print trend is evident across the shows, from streetwear items to smarter shirting, the newest iteration focuses on traditional techniques.'

Designers are keen to launch eco-friendly brands and some of the designers have already investigated sustainable fabrics and processes. One designer has recently launched a vintage collection based on eco-friendly principles which highlights the importance of sustainability issues to this designer. A key impediment to the launch of eco collections is the economic feasibility of making eco collections. As highlighted by one of the informants, '*I would love to have a business of that sort, but I don't have the financial capacity to take that risk, it requires a whole lot of admin, a larger team and a customer willing to spend a fair amount of money on the product. You will effectively make your customer pool very* *small and exclude a large group of people that won't be able to buy into your brand because they simply do not have the money to do so.'*

Overall, sustainability and especially from an environmental standpoint is definitely on the radar of small-scale fashion producers in South Africa who have started to incorporate eco-friendly processes and practices into their approach to garment construction and retailing. There are still real challenges around the availability of sustainable fabrics such as organic and natural fabrics and consumers are still hesitant to fully engage with eco-friendly brands and have not fully engaged with the need to prioritise eco-friendly purchases in the fashion industry. Pricing is a major consideration for consumers in the small-scale producer market and affordable options are preferred although generally the prices of garments made in smaller quantities and often tailor made to customer specifications tends to be higher. Designers are engaging with sustainability in differing ways and often in very innovative ways. As remarked by Informant E, '*There has been a shift towards sustainable brands, and it is an industry with exponential growth, however we have a long way to looking at the bigger picture, in terms of access to sustainable resources/mills and fabric and operational standardisation.'*

5.2.4 Transport options and sustainability in the small-scale producer market

The small-scale producer market has a limited impact on the environment in terms of transport options as garments are made in small quantities and transported in smaller vehicles with less adverse impacts on the environment in terms of air pollution or greenhouse gas emissions. This emerged in the email survey. The growing use of couriers and small parcel delivery options is growing in this market as shown by the responses of the designers and particularly in a COVID- 19 age. The transport industry is a major source of greenhouse gas emissions contributing significantly to adverse environmental impacts and has been flagged as needing intervention. The increasingly globalised nature of the fashion industry leading to air transport options from producers to markets in different regions of the world has led to adverse environmental impacts. A switch to eco-friendlier options in the transport industry has been recommended to reduce the environmental impact of transport intensive industries including the larger fashion producers.

5.2.5 Spotlight on waste management : designers' practices and initiatives

Waste management is a key aspect of sustainability that every designer has incorporated into their practices and processes. There is an evident focus on a deliberate waste management approach by the designers with a focus on recycling and upcycling of unused fabric to create new garments. Regarding waste management, one informant uses offcuts in innovative ways such as producing smaller garments, making masks, eyebags and packaging bags. Scraps of fabric are also given away to be used as ornaments in jewellery making and quilting. Waste management was not stated as important by one informant and the informant does not have a deliberate recycling program and did not feel the need to have one because they outsource most of their production and have no factory of their own. Somewhat in opposition to their statement this designer also indicated that fabrics left over after patterning and garment construction are upcycled to make various products and additionally extra or unused pieces of fabrics are given away or sold at warehouse sales which does indicate a deliberate resource management approach. Waste management initiatives appear to be key to all the designers' resource management approach and the various waste management initiatives reflect creativity by all the designers in how they incorporate recycling and upcycling into their processes.

5.3 An awakening of sustainability trends in South Africa

The sustainability trend, prior to the global pandemic, was slowly beginning in South Africa and designers have started to incorporate sustainable principles in their designs and some have more intentionally started to focus on sustainable and ethical fashion in a targeted manner launching eco collections and advertising their sustainability focus. Online and web-based marketing platforms have played a role in the awakening of interest in sustainable fashion. Blogs and social media pages focusing on promoting sustainable fashion are increasingly popular globally and in South Africa. The blogs are creative in their approach to sharing the sustainability message and some have quite a sizeable following.

The debates around slow fashion versus fast fashion are ongoing and have been a key feature of debates around sustainability. Slow fashion is generally associated with a more sustainable focus as it tends to favour a more deliberate and measured approach to garment construction but is the consumer ready to make the switch from fast fashion to slow fashion? As the effects of the global pandemic unfold, it is possible that the COVID-19 era may see a marked rise in the level of interest in slow fashion as consumers shift their values to a more eco conscious approach and perhaps adopt a growing consciousness of the environment and environmental factors.

One of the designers who participated in the study was very willing to share her design ethos and key features of her sustainable design approach. As a finalist for a South African sustainability award her insights were invaluable. The diagram below proposes key success factors or critical elements in a design philosophy with a focus on sustainability.

Figure 5.1 : Modelling the emerging critical success factors for a sustainable design brand in South Africa

(Source: Crafted from designers' profile and a telephone interview with one of the designers and winner of a sustainable design award)

5.4 Spotlight on key organisations and experts in the South African Fashion Industry

The rise in prominence and impact of the fashion industry is South Africa is reflected in the increasing influence of the organisations engaged in activities relating to the promotion of the industry or who are key support organisations in one way or the other. The Johannesburg Fashion district has been in existence for a number of years and is home to fashion designers as well as a large number of fashion entrepreneurs focusing on different aspects of the industry. The district while perhaps not the vibrant hub of activity envisaged at its inception has emerged as a distinct fashion focused precinct in the Johannesburg CBD. The district raises a number of questions relating to sustainability and how to position the industry more favourably for sustainability and what role the district could play in the transition to sustainability and has been earmarked as the hub of the fashion industry in Johannesburg.

To identify key trends in sustainability in the fashion industry as well as to get a more in-depth view of recent trends in the fashion industry, interviews were conducted with key players in the industry representing influential players in the South African Fashion industry. These interviews were meant to have been conducted on a face-to-face basis but due to COVID- 19 restrictions, online interviews and telephone discussions were conducted. A number of key informants who had earlier agreed to participate in the study declined to participate or stopped responding to emails citing COVID- 19 as an impediment.

5.4.1 Views of a creative industry entrepreneur

An email survey conducted with a prominent entrepreneur in the creative industries sector based in Johannesburg who has been in the sector since the early 1980s and has a long and illustrious history of setting trends and entrepreneurship in the creative sector revealed insights into the focus of sustainability in the sector and particularly the craft sector and the challenges and trends in the sector generally. The respondent focuses on the craft sector mainly but has insight into other creative sectors and has been involved in dance, theatre, fine arts and the fashion and design sector since the 1990s. The respondent indicated that that there were real challenges in the whole creative industries sector around cheap imports from China and how they negatively impact the viability of businesses in the sector. The respondent also highlighted challenges relating to how the sector worked with government expressing frustration at the difficulties in achieving particular objectives. In the respondent own words , '***Many of the people operating in the sector do not understand the sector or business and as a result have held the sector back.*** '

Other areas flagged by the respondent included the younger generations inability to really appreciate locally made products including clothing made in South Africa and preferring to buy overseas clothing. Regarding her experiences of the COVID-19 era, the informant felt that she was coping but was also able during this period to mentor other businesses as shown in her response below.

COVID- 19 EXPERIENCES (Prominent creative industry entrepreneur)
'I am coping well. I am mentoring and helping businesses pivot and doing all this online.   Many small businesses sadly, have not survived and a number of others are teetering. There is no tourism which has hit this sector hard and the biggest buyers have closed many of their stores – including the ones at the Airports.'

Regarding the importance of sustainability and environmental factors the respondent indicated that she placed a high value on adhering to sound environmental practices and that her customers also placed significance on how she incorporated environmental practices in her products. She stressed that working with artisans that also valued the environment was a key consideration in her work.

5.4.2 The Johannesburg Fashion District

The Johannesburg Fashion District located in the inner city of the Johannesburg CBD has been earmarked as the hub of the fashion industry in the city. A telephone interview with the head of the Fashion District Institute behind the revival of the district revealed a fashion industry and a fashion district struggling to keep afloat during the COVID-19 pandemic. The district comprises numerous small and micro enterprises operating in the district because of rent affordability and proximity to clients from across the city and the district offers a large selection of textiles making it a popular shopping destination in many ways. While the district's location in a perceived unsafe area of the city (Johannesburg CBD) has been a challenge, it has seen some revival. The Johannesburg Development Agency embarked on the rejuvenation of the Johannesburg Fashion District as part of urban regeneration initiatives in the inner city of Johannesburg. Regarding sustainable fashion trends in the district, the Director of the Johannesburg Fashion District stressed that in his opinion sustainability was still in its infancy in South Africa and was largely understood by fashion designers and even customers as economic sustainability mainly. He stressed that sustainability in relation to the environment is really understood more clearly by higher LSM groups and considered to be higher up on the ranking of consumer needs. Poverty concerns tend to override other factors in the buying decisions of consumers at the lower LSM groupings according to the respondent. The concept of environmental sustainability has not really taken root according to the respondent although that may reflect trends observable in the Johannesburg Fashion District only.

The district's pivotal location in the Johannesburg CBD may be an opportunity for a transition to more sustainable practices by the small-scale producer market if a concerted effort to promote practices and processes that safeguard the environment is made within the district. The influential nature of the district in a key fashion city may be ideal as a launchpad for a sustainability revolution that can be cascaded nationwide.

5.5 SA Fashion Week in an era of sustainability

SA Fashion Week has been in existence since 1997 and an interview with the CEO of SA Fashion Week, Lucilla Booyzen in the Fashion Week Handbook 2019 edition revealed an upbeat approach to the industry. She has been instrumental in the transformation of the industry since the end of apartheid. Her unique touch and approach to the industry is well known and she is a key figure in the industry. An attempt to set up a telephone or email interview with Lucilla Booyzen to explore the impact of the COVID- 19 pandemic on the fashion industry was unsuccessful. She declined to participate highlighting the prevailing uncertainty in the trajectory of sustainability initiatives during the COVID- 19 pandemic.

In recent years SA Fashion Week has had a noticeable focus on ethical fashion to reflect a more targeted sustainability focus and this reflects the ongoing move to a more visible sustainability orientation in the fashion industry as seen across the globe and that has now arrived in South Africa. A focus on sustainability places environmental and social justice issues at the forefront of the business strategy and operations of the local fashion industry. In 2020, in response to the pandemic restrictions, SA Fashion Week was conducted virtually as well with designers showcasing their wares on online platforms (SA Fashion Week, 2020). The collection was trans seasonal including both warm and cold weather features. The event was a three-day streaming event of 27 digital runway shows held from the 22nd to the 24th of November. A trade show was also held at the Mall of Africa with over 50 designers of men and womenswear. Additionally, there was also a pop-up shop where designer's wares could be bought online.

The SA Fashion Week Annual Report provides an indication of the nature and scale of the designer fashion sector in South Africa providing key statistics from the participation of designers in the SA Fashion Week event as shown in the table below. The figures reflect a designer fashion sector with a mix of ladieswear designers and menswear designers with a national presence and with a retail strategy focusing on boutiques and departmental stores nationwide.

DESIGNER FASHION SECTOR IN SOUTH AFRICA
289 Designers in South Africa [MAY REFER ONLY TO DESIGNERS REGISTERED WITH SA FASHION WEEK AND ON THEIR DATABASES]
60 Collections were shown on the SA Fashion Week Platform in 2019
53 Designers showcased their collections
39 Ladieswear designers
21 Menswear Designers
273 Designers stocking boutiques and departmental stores nationwide
171 Boutiques stocking SA Designers Nationwide

Table 5.1; Designer Fashion Sector in South Africa, Source: SA Fashion Week Annual Report 2019

The 2019 SA Fashion Week Annual Report indicates a strong focus on galvanising growth in the industry and a focus on sustainability (SA Fashion Week Annual Report 2019:29). A separate section in the annual report is focused on sustainability reporting, reflecting the priority ascribed to environmentally friendly practices by the organisation. SA Fashion Week has a bold plan to 'spearhead the development of an ecologically based and sustainable local design culture by 2025' (SA Fashion Week Annual Report, 2019). A number of key elements are proposed in the plan towards sustainability which include a collaborative approach with the designer community and the greater clothing industry. The sustainability focus will also include the promotion of circular economy principles through its activities and platforms. Key sustainable fashion criteria will be used to evaluate progress towards sustainability such as the use of fabrics with low environmental impact, incorporation of crafting techniques and zero waste cutting such as draping, knitting, or patterning. A curriculum of sustainable fashion workshops is part of the plan for sustainability promotion in the industry. The role of SA Fashion Week has evolved over the years as it is now playing a more visible and targeted role in various aspects of the South African fashion industry. African Fashion International located in Johannesburg also presents Fashion Week events in South Africa and was launched a few years ago and has a focus on the promotion of African brands. The influential nature of key organisations in the fashion industry positions them as ideal champions for sustainable practices in the industry and while this is already taking place there is room for these organisations to push harder for small scale producers to pave the way to a more sustainable industry which can then cascade the sustainable focus to larger players in the industry.

Fashion design training institutions or schools are increasing in number in Johannesburg, and they have unique insight into the industry and can also be influential in the direction that the industry will follow. An interview with a leading South African design school based in Hyde Park, Johannesburg focused on aspects of the fashion industry revealed a discernible focus on sustainability, creative dynamism and an industry that has continued to innovate. Young designers have introduced fresh inspiration into the local fashion industry and there is a wave of change and optimism in the industry driven by emergent designers seeking to grow their brands and millennial designers have been particularly transformative to the industry. **Figure 5.3** highlights some of the key themes emerging from the interview with the fashion design school and in many ways their insights and observations are in tandem with the designers interviewed. It would have been ideal to interview a few more schools. It is important to note that the views of this one school are interesting but it would have been ideal to interview more schools, *Trends in the South African Fashion Industry*

- Shift to smaller more sustainable collections from local designers.
- Influx of young, creative designers changing the way local fashion is viewed.
- Consumers are making a shift towards clothing produced mindfully.
- The Millennial generation is making a large impact on the fashion industry defining new trends especially in workwear.

Sustainability trends in the fashion industry

- A greater focus on sustainability by young designers.
- Designers moving away from fast fashion towards producing on a smaller scale and in a more quality conscious manner.
- A real sense of urgency on adopting sustainable practices.
- A shift from a more linear model to a more circular, ethical model of operation.
- The recycling trend is popular in South Africa.

Limitations to designing sustainably in the fashion industry

- A lack of access to sustainable fabrics locally.
- Challenges in transportation and distribution necessary for more sustainable fabrics.
- The rise of fast fashion has reduced demand for locally made sustainable clothing.

Waste Managment in the South African Fashion Industry

- Effective waste management is hampered by rising cost and availability of landfill spaces.
- A shortage of the equipment necessary to recycle, outdated technology and consumer awareness hamper effective waste management in the South African Fashion Industry.

Figure 5.2: A design school's view of South African Fashion ,Source: adapted from an online interview with a leading South African Fashion School

5.6 The transition to sustainability in the small-scale producer market : concluding remarks

A focus on sustainable fashion in South Africa is gaining traction due to worldwide trends towards greater accountability in environmental conservation in many industries and the fashion industry has long been denigrated for its adverse impacts on the environment. Sustainability is a growing area of focus and that is evident, even within a constrained operating environment.

The practices and processes of the six small scale producers or design brands in this chapter reflect that the sustainability trend appears to be important to designers. There is a definite indication that designers have started to engage with issues relating to environmental and social sustainability although economic sustainability remains a key concern.

The attitude of consumers to sustainable fashion indicates a lukewarm approach to sustainability. Consumers are moderately interested in the environmental impact of the fashion industry but do not show a very strong inclination to buy ecologically friendly brands, according to the designers. Consumer behaviour can be described as a combination of activities and influences that occur before, during and after the purchase itself (Paramasur and Roberts-Lombard,2013). The customer decision making process takes place between the marketing strategy as implemented in the marketing mix and the outcomes. This also raises questions regarding whether designers who already have eco collections or a strong sustainability element have communicated that focus to their customers in a way that would help them decide to buy or even think of buying environmentally friendly clothing.

A new concept called fast fashion has emerged since the late 90s and is evident in South Africa and has become the dominant type of fashion purchased by consumers for everyday use. Fast fashion garments are characterised by a short life span and disposability and are usually sold at affordable prices, explaining their appeal to the price conscious consumer. Fast fashion is very responsive to market changes and is quickly replaced as trends change seasonally (Choi & Cheng, 2015). This throwaway type of fashion has implications for environmental sustainability, especially regarding waste management issues like recycling and reusing. In Zimbabwe for instance, the fast fashion concept "bhero" emerged which refers to a bale of second-hand clothing from the UK and other overseas markets resold on the streets of Harare at extremely low prices. The worsening economic meltdown in Zimbabwe and a clampdown by the government on these markets has resulted in a scaling down of 'bhero' markets in various cities around Zimbabwe but there are still a few markets at disparate sites around the city. These markets are popular and remain an affordable option for clothing shopping in a recessionary market where large clothing chains are closing down and prices in the remaining departmental stores and the new boutique shops are out of the reach of most Zimbabweans. The 'bhero' clothing markets have become a popular shopping destination enabling the purchasing of reasonable quality second-hand clothing for as little as 1 USD!

Figure 5.3: 'Bhero' Market in Zimbabwe, Source: NewsDay Zimbabwe

The 'bhero' concept has been severely criticized as dumping of clothes by overseas sellers but has become a popular shopping destination for recycled clothing, especially for the poor and the youth. The scaling down of the bhero markets was not welcomed by the majority of Zimbabweans.

The important aspects of sustainability are prioritised differently by consumers and designers. Pricing and the availability of affordable clothing trumps environmental considerations in importance to the consumer as indicated by the designers. While the predominant focus of this study is mainly environmental sustainability, it may be that economic sustainability and social sustainability are more important to consumers than just environmental considerations, especially in this COVID-19 era. The question of ethical fashion which considers the working conditions and impact on society of the fashion manufacturer seems to be a key consideration for some designers and to some designers a pivotal consideration. The lenses through which consumers see sustainability are different from the designers indicating a need for greater understanding regarding what sustainability actually means.

Recycling is popular in South Africa, and designers have adopted interesting and creative ways to avoid wastage with innovative recycling initiatives. South African designers are also doing their best to support local initiatives that benefit the poor and other disadvantaged sections of society. Poverty in South Africa remains a real challenge 27 years after the fall of apartheid. The sustainability trend has also been observed in other parts of Africa as other regions of Africa have also started focusing on ethical and sustainable fashion. The *Ethical Fashion Initiative* is a flagship programme of the International Trade Centre (ITC). Kina Buti is a Nigerian based fashion brand that focuses on the youth and women (Kinabuti, 2021).

Ecologically friendly fashion has arrived in South Africa and preCOVID- 19 designers were adopting environmentally friendly approaches and launching eco collections. The trend to shift to a more sustainable approach is evident. The availability of fabric and the price sensitivity of customers emerged as a constraint to sustainable fashion. The case studies also revealed the small nature of fashion design businesses in South Africa which in itself poses a constraint to the ability to innovate and create niche lines like eco collections.

The myriad challenges in the fashion industry create further problems to innovation and a targeted focus on sustainability. Designers seem to target the youth market and generally the under 50 age group. This poses interesting debates regarding the glamourised nature of the fashion industry which seems to favour a youth market and definitely seems to steer away from positioning their brands for the older market. There is a very definite mismatch between the importance ascribed to environmental factors by the fashion designers and the importance ascribed by consumers. The use of couriers suggests that a lot of the designers had switched to online retail platforms even before the advent of the COVID-19 virus.

Orders are usually small and therefore the need for large vehicles with a detrimental impact on the environment is unlikely unless they have agreements to supply large retailers with their brands which can happen.

Organisational structures of fashion design businesses are based on a very lean approach with only a handful of employees working with the designer to produce and market their garments. The designer profiles reflect an industry trying to keep at the cutting edge of global developments and influenced by regional and international trends but adapting such trends to the South African market where issues like rising input costs and especially the availability of fabric makes sustainability innovation difficult.

Sustainability is a growing phenomenon in South Africa and while not all designers have chosen to focus their designs on environmentally friendly principles, there is a call and push to engage in discussions that focus on the environment. Social media platforms and fashion focused websites and sustainability focused events have been instrumental in pushing designers to be environmentally focused. Environmental advocacy in South Africa has contributed to the way consumers engage with the environment but that has not always translated to actions that lead to consumers choosing to buy clothing based on how they have been made and how they safeguard the environment. Key supporting organisations such as SA Fashion Week and the Johannesburg Fashion District have a role to play in promoting sustainability initiatives in the fashion industry. Fashion schools have also played a role in promoting sustainability and encouraging fresh approaches to garment making and retailing. The designers revealed that the small-scale nature of design businesses in South Africa made it costly to incorporate eco-friendly principles and to launch eco collections and the few designers that had launched such brands faced problems with finding the right fabric to use that is environment focused and fabric availability remains a challenge to the industry.

Waste management and recycling initiatives have shown that there is growing awareness of the need to reduce waste in the garment manufacturing process and waste management initiatives take myriad forms such as recycling, upcycling, and reconstruction, as well as the donation of extra fabrics to charities. The use of chemicals and dyes is limited, and the price sensitive nature of the South African consumer was highlighted. Illustrating the adoption of eco fashion principles in the Southern African region, one of the leading designers in Zimbabwe, Zuvva Designs has launched an eco-collection although the real economic challenges and other constraints facing designers in Zimbabwe prevent consumers from really showing buying interest or actions relating to eco fashion or sustainable brands.

Water usage was not interrogated in the review of designer processes because of their small operations. The impact on water bodies of the fashion industry has been widely documented and certain fabrics like cotton are known to have an extremely high usage of water. The need to switch to renewable energy sources has become an issue that many industries have grappled with. The increasing load shedding in South Africa and the need to reduce electricity usage presents a challenge in the fashion industry highlighting the need to explore alternative power sources and especially renewable energy sources like solar energy in a country grappling to provide electricity.

Small fashion design businesses face a number of constraints as they navigate the sustainability landscape, and it is hoped that they will be able to overcome the hurdles they face. As the pandemic unfolds, new challenges and perhaps opportunities for the fashion industry to be sustainable will emerge. The question of what sustainability actually means to the designer and the consumer is actually a niggling issue and the trajectory of sustainability initiatives for small scale fashion producers is an emerging trend. The economics of viability have overshadowed the industry in many ways.

CHAPTER SIX

The impact of consumer demand on sustainable fashion

6.1 Introduction

In the first half of this chapter, I will engage with key concepts and theories relating to the drivers of consumer demand drawing from psychology, marketing theory and new product development models to present likely scenarios and trajectories of sustainable fashion in South Africa. I will critically interrogate and explore consumer demand in relation to sustainable fashion by providing an overview of consumer behaviour theory in relation to new product adoption, reviewing recent research conducted with consumers in other localities (consumer research on sustainable fashion is a growing focus in other localities) as well as South African recent demographic data that could possibly speak to the ways in which consumers could engage with sustainable fashion as an emerging concept in South Africa. In the second half of the chapter which has a more empirical focus I will present social media consumer research into the trends in adoption and engagement with sustainable fashion across the globe and in South Africa. In this second half of the chapter, I will also present key trends emerging from a consumer survey conducted in Southern Africa. In the conclusion to this chapter, I then summarise what I posit will most likely be the trajectory that consumers will follow regarding sustainable fashion in South Africa drawing attention to likely drivers, inhibitors, and enablers of the adoption of eco fashion as a popular consumer segment in South Africa in the specific context and situation of an African country and in the global South.

Consumer demand is often the defining and intrepid driver of a product's success or can be like the misaligned brick in a high rise building when a product fails. While fashion is without doubt a product with universal appeal, the rise of specific fashion genres appealing to particular market groupings has made the market segmentation and product development aspects of the fashion industry rather complex. This chapter focuses on the demand side of sustainable fashion and explores the ways in which consumer behaviour and consumer expectations influence the adoption of sustainable fashion. As we saw in chapter five, small-scale independent fashion designers have started to engage with environmental sustainability in an evolving way. Conscious design decisions are clearly an important element in sustainable fashion and the consumer is perhaps the most crucial element. This is not to suggest that small-scale independent producers are interested only in producing for a consumer who is only interested in price (unlike the unsustainable mass-distribution sector). In many instances the costs associated with more sustainable options (e.g., fabric with non-toxic dyes) cost significantly more than available options. A key finding emerging from the analysis of the designer surveys has been the lukewarm or moderate engagement with environmental issues of the customers of the profiled designers as outlined in Chapter five. The majority of the six designers reported that their customers did not really consider environmental issues to be critical to their decision-making regarding clothing purchases.

My intention had been to conduct surveys directly with consumers in South Africa to understand their attitudes, views, and experiences with eco fashion or sustainable fashion, but the rather unexpected COVID- 19 pandemic prevented face to face consumer surveys in South Africa as had been originally planned but I managed to speak to consumers outside South Africa but still in Southern Africa. The very real risk of the pandemic and resultant social distancing restrictions meant I had to also find other ways to assess consumer sentiment towards sustainable fashion. I decided to do two things. Firstly, I scoured the internet for sustainable fashion social media pages that could contain information that would give me some indication of how consumers are engaging with sustainable fashion globally and in South Africa. Conducting consumer research on social media has become an increasingly popular research methodology given the rising influence of social media in every aspect of our lives. I discovered that the social networking site Instagram had quite a few sustainable fashion focused pages which had content that consumers or potential consumers of sustainable fashion could comment on, like and engage with in different ways. Similarly, Facebook while losing popularity to other social media platforms such as Instagram also had many pages that were focused on sustainable fashion. I then conducted content and thematic analysis of a selected number of the identified Instagram pages and five Facebook pages. My analysis was aimed at gleaning consumer engagement related data and focused on reviewing consumer or follower activity indicators such as comments and likes on the five most recent posts mainly but also looking at posts in the last year. Investigating the profile of the followers, their response to particular posts and the nature of the content shared on the selected pages allowed me to build a picture of the way consumers and the social media page owners are engaging with sustainable fashion. I selected a few social media pages of South African designers to determine how consumers were engaging with their brands including sustainable fashion brands. This exercise allowed me to further engage and interrogate the South African designer view or small-scale producer view outlined in chapter five which posited that consumers in South Africa were somewhat lukewarm towards sustainable fashion. The social media pages focusing on sustainable fashion on Instagram and Facebook were focused mainly on the global north, but one or two pages focused on Africa enabled me to make some comparisons, although there were noticeably fewer pages with an African focus or based in Africa. I could not find a single South African Facebook or Instagram page set up to build a community interested in sustainability in the fashion industry which I thought was quite telling of the level of engagement and awareness of eco fashion in South Africa. What I decided to do to tap into insights from South Africa was to look at two sustainable fashion brands identified as such and examine how followers were engaging with their content. I looked at two South African sustainable fashion brands widely reported in the media to be adhering to eco-friendly principles. I chose to focus my investigation on *Fundudzi,* launched by Craig Jacob (a leading South African designer) and described as "Africa's first ethical and sustainable label" and *Sitting Pretty,* a South African ethical fashion brand located in Cape Town. This chapter will also include results of a consumer survey that I conducted in Southern Africa with shoppers/consumers to probe factors relating to awareness and engagement with sustainable fashion. This consumer research provided unique insights into the nuances of consumer behaviour relating to sustainable fashion as an emerging fashion product particularly in the Global South. The use of Instagram for brand promotion and brand marketing has become a popular way for designers to showcase their wares. While not all designers have a sustainability focus, an Instagram page provides a platform for selling and promotion of fashion products as e-commerce shopping platforms take centre stage.

6.2 Imagining sustainability in the South African context

While sustainability has certainly arrived as a design philosophy and a business focus in South Africa, there is need to interrogate the possibility of significant consumer demand and the kind of influences that would impinge or drive consumer behaviour in relation to sustainable fashion. Sustainability has a triple focus on environmental, social, and economic factors and while the focus in this thesis is on environmental factors mainly, it appears the understanding by small scale design producers of sustainability is in an evident way on economic stability and profitability and this was highlighted in chapter five. In other words, it is also a question of survival for most of these small-scale producers. It is important to recognise, however, that the South African consumer has unique attributes, purchasing behaviour and ways of engaging with fashion, all of which will be interrogated in this chapter. Cross-cutting themes that have impacted the evolution and development of South Africa in recent years such as migration trends, race relations, social justice issues, inequality, the growing wealth, and income divide as well as overt and subliminal forces shaping and impacting consumer behaviour globally and in South Africa will be explored, interrogated, and deciphered in this chapter. There is a growing body of literature that interrogates consumer behaviour in relation to sustainable fashion, particularly in the global north. A country in transition and a country facing multiple dilemmas relating to poverty and economic growth as well as social justice and social challenges is perhaps one way to describe South Africa at this juncture.

A striking feature of South African society is the cosmopolitan cultural landscape and the diverse nature of the country in the post-apartheid era. Modernity aside tradition and a strong cultural heritage besides a contemporary westernised aesthetic has positioned the country as truly diverse in many ways. A striking country attribute unique to South Africa relates to the evident income and wealth inequality that juxtaposes the wealthy next to the poor in a way rarely seen across the globe. The critical nature of poverty issues have remained a niggling Achilles heel in the country's development post-apartheid although there have been noteworthy developments and advancements to tackle a rather thorny issue. Poverty remains a critical issue in 21st century South Africa, despite the ongoing interventions, policies and initiatives that have sought to address poverty and social justice issues in the country. The rich cultural heritage of South Africa with 11 official languages and varied ethnic groups as well as racial groups is a case in point. The marked variations across a number of demographic criteria in South Africa has led to a truly cosmopolitan nation that can in many ways be truly said to be a nation with immense diversity, identifying the nation as one of Africa's most multicultural nations. The arrival of regional migrants mainly from different regions across Africa and notably Southern Africa has added to the cultural and ethnic diversity of the nation infusing an 'African diaspora' into South Africa with their concomitant unique traits, practices, and attributes. These migrants have impacted every sphere of South African society and industry in an evident and visible way. The ongoing challenges relating to the COVID- 19 pandemic and its economic and social impacts have also been transformative and formative to the way the country has been shaped in recent years and these impacts will be interrogated in Chapter 7.

Consumer choices play a fundamental role in sustainable fashion purchasing behaviour (McKeown & Shearer, 2019) and it is pertinent to interrogate the profile, characteristics, and attributes of the South African consumer and against the backdrop of the prevailing high-income inequality in the country and deepening wealth divide (IMF, 2021). Sustainable fashion has garnered increasing interest in recent years and has sparked a worldwide revolution in the way fashion choices are associated with environmental impacts and increasingly aided by younger consumers and associated with the voices of celebrity influencers (McKeown & Shearer, 2019).Younger consumers have tended to be more favourably disposed towards the sustainability trend. Millennials, born between 1981 and 1996, have been pinpointed for their greater environmental awareness (McKeown & Shearer, 2019).

Generation Z, consumers born between 1997 and 2012, have also shown an affinity towards environmental causes (Mckinsey, 2019) but this may not necessarily be true of Generation Z consumers in the poorer global south, who may not all be as environmentally aware as their context may impact their knowledge of environmental issues and engagement with environmental issues differently from Generation Z consumers in the richer global north. According to the 2019, Mckinsey State of the Global Fashion industry report, nine in ten of the generation z age band believe companies need to address social and environmental issues (Mckinsey, 2019) The adoption of sustainable fashion by millennials has been attributed to their environmental values relating to a rising eco consciousness and social consciousness although some authors have refuted this trend, citing the low purchasing power of millennials as a barrier to eco fashion adoption (Sorensen & Jorgensen, 2019). Consumer behaviour plays a critical role in the adoption of new products and impacts the adoption of sustainable fashion. A study by Delimarti & Rahadi (2021) drew attention to the importance of consumer preferences such as price, quality, brand image and marketing promotion in influencing sustainable fashion purchases. I would also like to propose and contend that sustainable fashion choices may show differing trends along racial lines and that this may be crucial to interrogate in a society like South Africa with a diverse racial profile. My contention is that in a South African context, the racial and income breakdown and demographic characteristics of the nation's population coupled with the historical legacy of apartheid has to be considered or factored into the equation when trying to decipher trends related to the adoption of fashion products like sustainable fashion. As highlighted by Bogatsi (2002) there has emerged a definite youth culture in black townships which posits certain ways of dressing. This generation has been more immersed in global flows of music, style and fashion. This consumer group is important in that adoption of consumer trends can be cascaded to other consumers. The emergence of small scale designers has led to radical identities seen in the variety of design aesthetics in South African fashion. The youthful nature of designs seen in small scale designers shows the clout of this market segment especially in the middle class.

6.3 Sustainable Fashion in South Africa and consumer trends

The global trend towards a more sustainable fashion industry has only recently taken off to become more widely adopted as a design, manufacturing and retailing approach in the fashion industry, particularly in the Global North or more developed regions of the world. Within the Global South or developing world as well as in emerging markets, the sustainability concept is only just beginning to be taken seriously. South African designers face somewhat of a design, production and marketing dilemma relating to sustainability policies and adopting sustainable business models and launching eco collections as they pursue sustainability initiatives because of the low level of engagement and awareness of environmental issues of their customers. The South African consumer may perhaps be aware of the importance of environmental issues and in some cases is actively engaging with environmental issues but may still be far from placing environmental considerations at the apex of clothing purchasing decisions. This emerged in the responses of the designers who while stating that their consumers placed some importance on environmental factors in their purchasing decisions their interest was not that significant.. The lukewarm engagement with environmental issues emerged in the designer surveys and telephone interviews as well as key informant interviews and this trend has also been corroborated in other consumer focused research from other regions of the world. There is still hesitancy in the manner in which consumers engage with and embrace sustainability issues relating to sustainable fashion. Lisa et al (2021) argue that consumer response to sustainable is not translating into actions by the consumer. The profile of the South African consumer is worth investigating in some detail in this chapter to interrogate underlying attributes and predispositions that may impact their adoption of sustainable fashion and particularly so in a South African context and in a COVID- 19 era.

Environmental issues in the fashion industry have long been a cause for concern particularly in the Global North (Grebosz-Krawczyk & Siuda, 2019) and sustainable fashion has the potential to address the negative impacts of the fashion industry on the environment. The arrival of a sustainability focus in emerging markets and the developing world which is slowly becoming an area of investigation presents a need to analyse the likely responses of a different type of consumer to what can largely be considered to be a novel product or concept. Sustainable fashion or eco fashion is still a new arrival to the fashion industry in Africa including South Africa. The green movement and a growing eco consciousness is a global phenomenon but certainly led and spearheaded by the more developed regions of the world. Consumers play a critical role in the transition to sustainability and their attitude and behaviours towards sustainable fashion are key determinants of sustainable fashion consumption. Consumer behaviour refers to the potpourri of factors influencing purchasing behaviour amongst consumers towards defined products. Greater eco consciousness in some regions had led to a more visible interest by consumers in sustainability and regarding the impact of their purchasing behaviour on the environment (Grebosz-Krawczyk & Siuda, 2019). It is interesting to note this trend but most of the research that has focused on consumers has been in the global north and may only be an emerging trend in the global south. The designers profiled in Chapter 5 revealed that consumers ascribed mainly moderate importance to environmental concerns when considering clothing options. In this chapter, factors influencing consumer behaviour towards sustainable fashion and global trends in the attitudes and perceptions of consumers towards sustainable fashion are explored. Wong et al. 2005 alludes to the rather lacklustre adoption of environmentally friendly products by consumers and that the anticipated adoption of green products was lower than had been expected. Variables hampering adoption of green products identified include the lack of a clear positioning of green products regarding their product attributes and often the importance of product attributes impacting product performance superseded green product benefits in the mind of the consumer (Wong at al. 2005).

There has been a rallying call to sustainability but the understanding of consumer purchasing behaviour towards green products including sustainable fashion is still evolving. The green product revolution has only recently arrived in South Africa. The South African consumer has unique attributes that impact their adoption of green products, and it is pertinent to understand these factors to determine likely purchasing behaviour and sustainable fashion affinity.

Research conducted to ascertain attitudes and behaviours towards sustainable fashion in a number of markets has revealed there is hesitancy in the adoption of sustainable fashion (Henninger et al. 2016). While this may not be the case in South Africa, discussions with designers outlined in Chapter five have revealed a lukewarm or moderate importance ascribed to environmental concerns by consumers compared to the designers who appear to place more emphasis on environmental issues. There appears to be a yawning disconnect between the importance ascribed to the environment by designers and the sentiments of their customers.

The attributes of the consumer in sustainable fashion purchasing decisions often underlies the trends noted in different markets relating to the adoption of sustainable fashion. The rise of green products in many product categories bodes well for the sustainable fashion industry but there may be specific factors unique to the fashion industry relating to the consumer experience that need to be interrogated. Consumer behaviour influences which products will be bought and why. The consumer is an integral part of the equation that determines whether there is a role for eco fashion in South Africa. Recent studies in different regions across the globe have revealed that the awareness levels and understanding of green products by consumers is limited (Lundblad & Davies, 2015). The plethora of terminologies are a constraint to consumers buying sustainable brands, including fashion (Lundblad & Davies, 2015). There has been comparatively little research to see how consumers relate to sustainable fashion (Lundblad & Davies, 2015). There is still a shortage of studies on consumer behaviour and sustainable fashion (Guedes et al. 2020). Most research on sustainable fashion trends has been focused on the production side of the emerging market, with little research really looking at the consumer (Jagel et al. 2012). Additionally, there has been little research focusing on actual consumers of sustainable fashion.

The concept of sustainability is a contested term, and this is seen in the way consumers perceive and understand the term. The unclear definition of sustainability poses a challenge to any implementation of a sustainability program. The somewhat fuzzy definitions in the green products realm have often caused confusion and this presents a barrier to consumers adopting green products (Caniato et al., 2012). A growing eco consciousness has raised the profile of green or eco-friendly products. Consumers make purchasing decisions based on differing variables and their attitudes towards green products generally play a role in their likelihood and actual purchase of environmentally friendly products.

The propensity to engage with sustainability by fashion designers in South Africa is possibly catalysed by the growing global call for the fashion industry to exhibit more accountability and transparency regarding environmental impacts. In this chapter, we delve deeper into some of the drivers, motivations and attitudes of consumers relating to the adoption of ecologically friendly products and eco fashion products more specifically. According to the majority of designers profiled, environmental focus was moderately important to their customers in their purchasing choices. This would tentatively suggest that environmental factors are not a key priority yet for consumers in South Africa and there is a mismatch between designers expressed focus to adopt eco-friendly practices and their consumers' willingness to purchase such products. Information in this chapter is gleaned from observations by the researcher, reviews of relevant literature on green product purchasing behaviour and insights from designer case studies/ profiles.

6.4 Profiling the South African consumer

Who is the South African consumer and more specifically who is the South African consumer in relation to the purchasing of sustainable fashion or the propensity to purchase sustainable fashion? This question drills down to the unique attributes and characteristics of the South African consumer particularly regarding the purchasing of clothing and fashion products. The South African consumer is by no means a homogenous entity but there may be particular attributes specific to the South African consumer that have a bearing on the way they purchase fashion products or engage with sustainability issues inherent in the country's unique profile, history and positioning in Africa and the world. South Africa has a population of 58.8 million according to 2019 mid-year population estimates and is a country with a diverse cultural and racial grouping (StatsSA, 2020). According to StatsSA mid-year 2019 estimates a key feature of the South African population is the predominantly youthful element of the population with almost 28% of the population younger than 15 years. The older age groups such as the middle age and older age groupings comprise a lower percentage of the population.

The profile of the typical sustainable fashion buyer has tended to be a person with a known eco consciousness and social consciousness and millennials (Generation Y) as well Generation Z consumers are more likely to be buyers of eco fashion or sustainable fashion (Sorenson & Jorgenson, 2019). In interrogating the drivers of sustainable fashion purchases globally and in South Africa it is pertinent to explore the unique attributes of the South African population and the South African consumer.

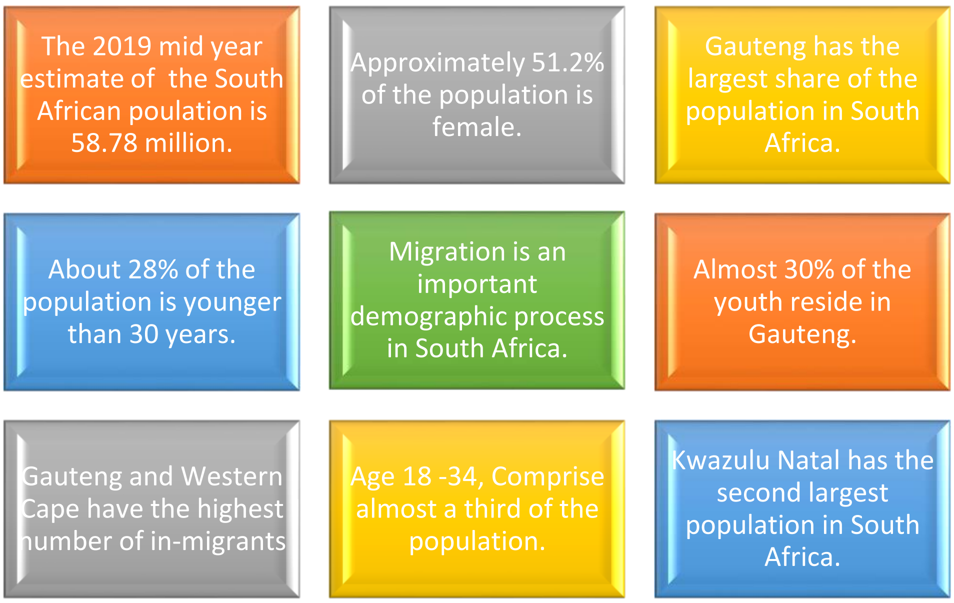


Figure 6.1: The South African population according to 2019 mid-year estimates, Source: StatsSA 2019. Mid-year population estimates

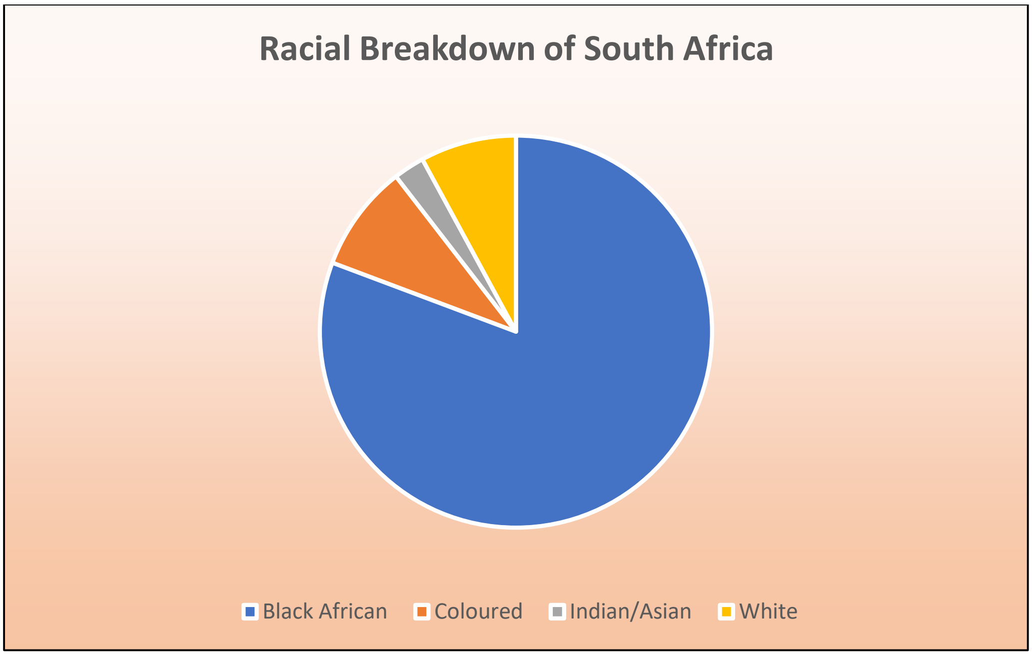


Figure 6.2 : Racial Breakdown of South Africa, Source: StatsSA 2019, midyear population estimate

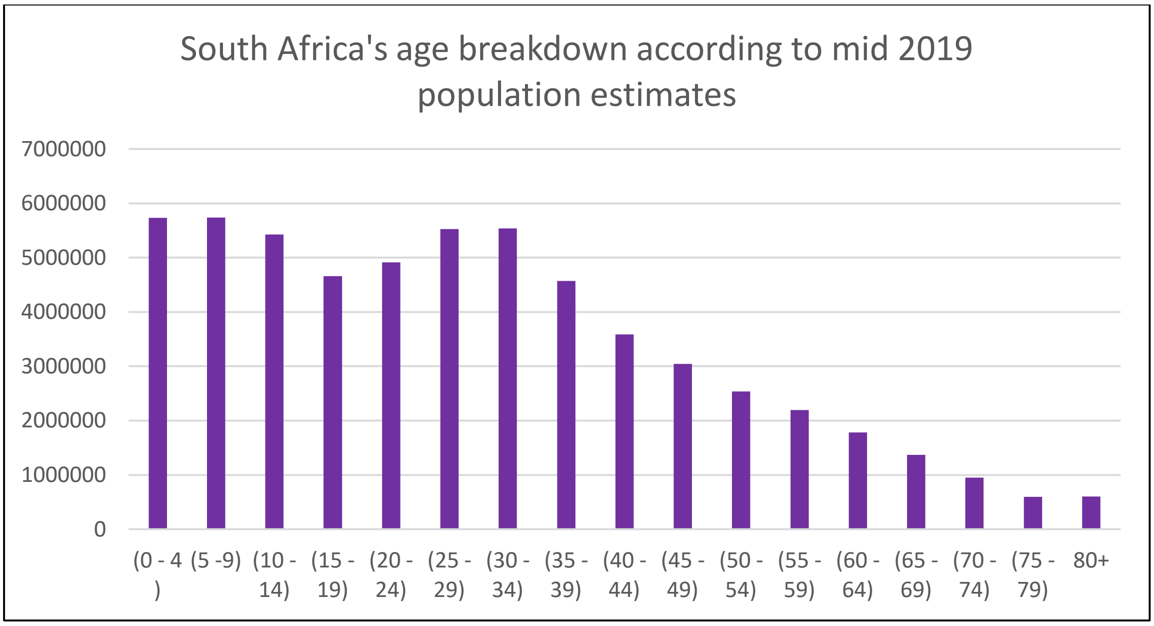


Figure 6.3. Age Breakdown of South Africa, Source: StatsSA 2019, mid-year population estimates

South Africa is a very cosmopolitan country which has been further diversified by its immigrant dynamic and exhibits a particular racial profile and social system that is unique to the country. Black Africans comprise 80% of the South African population and this is a significant percentage and an overwhelming majority. The other racial groups comprise a much smaller percentage of the population but have a better wealth and income profile with more high-income earners and access to services and amenities likely to be more widespread in this segment. Does the particular racial breakdown of the South African population have particular implications for the adoption of sustainable fashion? This may seem like a trite question to ask but race can have a bearing on preferences and of course may also impact education and awareness levels relating to environmental factors as well as income and wealth differentials. The historical legacy of income and wealth inequality in South Africa cannot be divorced from any discussion relating to South Africa and how it influences all aspects of society. Baumann (2004) shows how consumerism intermingles with poverty and how consumerism is emerging in a society of consumers even in the very lowest consumer income bracket

To understand the wealth profile of South Africa it is necessary to understand the income and wealth brackets of the country. The nature of sustainable fashion is that in many ways it is targeted and more likely to be adopted by the higher income groups of a nation and particularly with its roots in the westernised and developed regions of the globe. The LSM groupings of South Africa bring some light into the distribution of wealth and income brackets in the South African population and what difference this can make to purchasing power and access to services and also will impact fashion product purchasing behaviour.

South Africa has a very youthful population. The age profile of the South African population according to StatsSA mid-year population estimates 2019 is greatly skewed towards the younger age groupings. A high percentage of the population falls into the millennials (generation y) and generation z bands which may suggest an ability to be more favourably disposed to sustainable fashion (Mckinsey, 2019) but will perhaps be tempered by other factors impacting this age band in South Africa such as the high unemployment rate and issues peculiar to cultural and ethnic preferences and behaviours. The nagging question in South Africa is the growing divide between the poor and the rich which suggests that sustainable fashion may only really be positioned for the upper end of the market in the higher LSM grouping such as the LSM 8 -10 groups.

LSM GROUP	**LSM GROUP DESCRIPTION**
LSM 1- 4	These comprise the poorest consumers with the least access to wealth. Salary range falls between to R1363 to R3138. Household shelter is very basic living in a traditional hut or even a shack. This group has minimal access to services. Radio is an important communication segment in this market.
LSM 5 – 7	These consumers have High School or some level of higher education May be rural based or urban based but not surburban. Salary falls in the range of R4165 to R11263 Media is also largely commercial radio with also a wide range of TV channels and other form of print, outdoor and electronic media
LSM 8 – 10	High school and higher schooling Largely urban and surburban Salary is R13210 to R32251 Media usage is quite diverse with wider access to all forms of communication Full access to services and amenities with the highest purchasing power,

Table 6.1 : South Africa's LSM (Living Standard Measures) Classifications

The impact of the arrival of migrants from different regions of Africa to South Africa has had a transformative and formative element on the country in diverse spheres. Migration trends have shaped the social and economic development of South Africa in a tangible way and the migrant has played a key and visible role across diverse sectors of South Africa. A walk through the Johannesburg CBD before the COVID- 19 pandemic was an enlightening journey of discovery relating to South African migration trends. From Congolese merchants to Zimbabwean vendors, Zambian wholesalers, Nigerian retailers, Pakistani traders, and a host of other African and Asian nationalities selling their wares on the streets of the city. It was remarkable to see the extent and influence of the migration trends to South Africa on the economic landscape and social fabric of the country. In relating to fashion, the visible influence of Nigerian migrants who also have a strong tradition and heritage in the fashion industry is apparent as well as migrants from other fashion focused regions in Africa and Asia. Lagos has been described as a strong contender to Johannesburg vying for the continent's leading fashion city (Jennings, 2015). From all regions of Africa, migrants have found their ways to South Africa and specially to leading cities like Johannesburg described as Egoli or 'city of gold' and Cape Town,'ekapa as well as Durban referred to as Ethekwini'. The Johannesburg Fashion District in downtown Johannesburg is a clear reflection of the pan African and Asian influence apparent in the South African fashion industry. The Johannesburg fashion district has attracted customers for large events like weddings, and matric dances as well as funerals and has really been impacted by the decline in the events industry during the COVID- 19 pandemic as emerged in a telephone interview with the founder and director of the district described in detail in chapter five. The district exhibits a very African and Asian flavoured dynamic and has been influenced by the trends and cultures of migrants as well as the retail formats of the countries of the migrants creating a very diverse retail area in the CBD with markets and stores reflecting the whole continent.

Race issues in the fashion industry have been raised repeatedly and particularly relating to the treatment of models of colour and also relating to social justice issues impacting garment workers in Asia and also relate to the disproportionate impact of environmental impacts on poorer communities which has been the crux of the environmental justice and environmental racism movement. Does race play a role in the adoption of sustainable fashion? What kind of trends can be seen along racial lines in relation to the adoption of sustainable fashion, engagement with environmentalism and a propensity to buy sustainable fashion? I think it is fair to say that sustainable fashion has tended to be more popular in the Caucasian racial group and supported very vehemently by high profile designers and celebrities such as Stella McCartney, Rosario Dawson, and Emma Watson? The question of consumer purchasing power in particular countries including South Africa may differ markedly according to race. Sustainable fashion is generally more expensive, and this emerged in the designer interviews where the price sensitive nature of the South African consumer was stressed and given this attribute, what is the likelihood of large numbers of South African consumers purchasing sustainable fashion? The adoption of a new product may follow ingrained behaviours relating to the ways that consumers generally adopt products and may also be in line with specific income trends, cultural factors, and affordability factors in particular countries. Given the profiling of the South African consumer and population the question that needs to be asked is to what degree will a South African consumer be likely to adopt sustainable fashion. There is an emerging market segment but can sustainable fashion move beyond the somewhat niche nature of sustainable fashion purchases currently to a more widely adopted fashion product or even to become a product with a mass market appeal. Can we estimate to any accuracy the percentage of the South African population that could buy sustainable fashion or even think about buying sustainable fashion? In a population of 58 million, what percentage of the population would be able to afford to purchase sustainable fashion or are even thinking of fashion along environmental lines and how important are pricing factors in sustainable fashion purchasing decisions?

In trying to quantify the percentage of the South African population that would likely be sustainable fashion buyers it is necessary to explore different facets of the South African population as well as comparatively explore factors that have characterised the adoption of sustainable fashion in different regions globally. **Table 6.2** below is an attempt to explore the likely impact of different factors and attributes on fashion purchasing behaviours and their impact on the way the South African consumer would adopt sustainable fashion in South Africa.

TOTAL POPULATION	**58 MILLION**
ASSUMPTIONS	SUSTAINABLE FASHION MORE FAVOURED BY WEALTHIER AND EDUCATED CONSUMERS (THOMAS, 2008). SUSTAINABLE FASHION AWARENESS HIGHEST IN THE MILLENNIALS AND GENERATION Z AGE BAND (MCKINSEY ,2019). POSSIBILITY OF SUSTAINABLE FASHION CHOICES ALIGNED ALONG RACIAL LINES (MORE LIKELY TO BE A CAUCASIAN CHOICE) AFRICA STILL LAGGING BEHIND IN THE ADOPTION OF GREEN INITIATIVES INCLUDING SUSTAINABLE FASHION
PERCENTAGE OF THE SOUTH AFRICAN CONSUMER CLASSIFIED AS HIGH INCOME	62.3% of South African households fall within the poorest income bracket (Standard Bank, 2016) Wealthiest households account for 1.2 % of the population (Standard Bank, 2016). Middle income groups comprise 32.3 % of South African households (Standard Bank, 2016).
PERCENTAGE OF THE POPULATION IN THE HIGH-INCOME BRACKET WITH LIKELY AWARENESS OF ENVIRONMENTAL ISSUES	POSSIBLY A MINUSCULE PERCENTAGE AND FALLING WITHIN THE MIDDLE INCOME AND HIGH-INCOME GROUPS.
ESTIMATED PERCENTAGE OF THE POPULATION FAVOURABLY DISPOSED TO SUSTAINABLE FASHION	HARD TO GIVE AN EXACT ESTIMATION BUT GIVEN THE EMERGENT NATURE OF SUSTAINABLE FASHION MAY BE A VERY LOW PERCENTAGE.

Table 6.2 : Quantifying and exploring sustainable fashion purchases in South Africa

A key theme emerging from the designer profile interviews and subsequent telephone interviews revealed a strong leaning to price sensitivity and other pertinent characteristics as shown in **Figure 6.4**

Figure 6.4: A hypothetical diagram illustrating the characteristics of a consumer focused on designer fashion in South Africa

As mentioned earlier, according to the designers in this research. environmental factors are not at the apex of consumer decision making regarding clothing fashion purchases and interest in environmental factors is moderate or lukewarm. The higher price of sustainable fashion presents a barrier to consumers who are reluctant to pay more for eco-friendly clothing. One of the designers stated decisively that to focus only on producing sustainable fashion would be to alienate the majority of their customers which does indicate hesitancy towards purchasing more expensive sustainably made clothing. It is also interesting to note that the designers analysed in chapter five had a strong leaning on the younger consumer and the under 40s and under 50s age groups. One designer focused on millennial customers expressly who have in other regions been more likely to be interested and to purchase sustainable fashion. Research in other markets has indicated that younger consumers are more likely to engage with issues pertaining to the environment and be more eco conscious. Small-scale designers also tend to price their products higher than the mass market fashion producers who focus on fast fashion and price their products much lower than the more exclusive small-scale producer. In a market like South Africa, pricing plays an important role in influencing consumer decisions and while consumers of more bespoke fashion are willing to pay more, they may not be willing to pay even more for sustainable fashion. The majority of the designers in the small-scale producer market are fairly young and new entrants to the industry which does mean that they may be more willing to engage with global trends such as a growing eco consciousness and could be influential in pivoting the fashion industry towards sustainability.

6.5 Consumers and the adoption of new products

There is a robust body of literature exploring consumer behaviour including consumer behaviour relating to sustainable fashion. How do customers make purchase decisions ?

Marketing theory provides a basis for understanding the behaviour of consumers as they reflect and purchase products. Paramasur & Roberts-Lombard (2013) and Kotler (1991) shed light on the way purchasing decisions are made by consumers. The underlying principle impacting purchasing behaviour relates to consumer characteristics and therefore it is crucial to understand your customer. Behaviours and motivations of consumers usually reflect a potpourri of influences. In adopting new products there are usually defined stages to consumer actions and sales growth. The seminal product life stages of new products defined by Kotler (1991) in the product life cycle go from an initially slow adoption cycle to a peak and decline and these stages may be revisited as products are rejuvenated and relaunched. In the adoption of new products, the stages may vary but the model outlined by Kotler (1991) still offers a useful rubric to product adoption and sales growth forecasts throughout the product life cycle. There are characteristics that are associated with customers in particular product stages. The first consumers to adopt a product are early adopters and the very last ones are called laggards. Socioeconomic factors play a role in how consumers select products. Laggards are the last adopters and take the longest time to embrace new products. In the adoption or purchasing of green products there have been many early adopters who purchased the products quite quickly while the majority have tentatively pondered and slowly begun to try out any green products.

While the product life cycle provides a general guide to the adoption of products, many product categories may follow a different trajectory. Consumers categorise products in many ways and one way is to categorise them into low involvement and high involvement purchases. Low involvement products are frequently purchased and inexpensive and with little risk and little information needed (Kotler, 1991). This may be likened to fast fashion purchases requiring little thought and are inexpensive. The opposite of low involvement products are high involvement purchases bought infrequently but are high risk and where much information is needed for decision-making. This may be likened to slow fashion and sustainable fashion purchases which are often quite expensive requiring a considered approach to decision-making. Sustainable fashion can be classified as a high involvement product requiring much thought before purchasing. The importance of providing adequate product details to consumers for high involvement products cannot be underestimated. The question to be asked is, are clothing retailers and fashion designers providing enough information to consumers to be able to make a purchase decision regarding sustainable fashion? The novel nature of eco fashion requires a different approach to marketing compared to fast fashion.

A wave of green innovations and green economy developments have characterised recent decades. Fichter & Clausen (2021) explain the trajectory of the diffusion of environmental product innovations relating to environmental sustainability while acknowledging that different sectors will exhibit different characteristics in the way they perceive and adopt green products or green innovations. A concern regarding research on green innovation is the sector specific focus of these investigations. Most research on green product adoption has been focused on a single sector making it hard to generalise across sectors but still providing some level of understanding of green product innovation. Fichter & Clausen (2021) draw attention to the multitude of innovations that have been focused on addressing environmental issues but highlight that about two-thirds of them are still considered niche type products or innovations. The ability of a green product or innovation to achieve impact that influences consumption or production depends on requisite policies needed to aid speedy diffusion of these innovations. Fichter

& Clausen (2021) suggest six key areas of influence that impact the diffusion rate of green products or services.

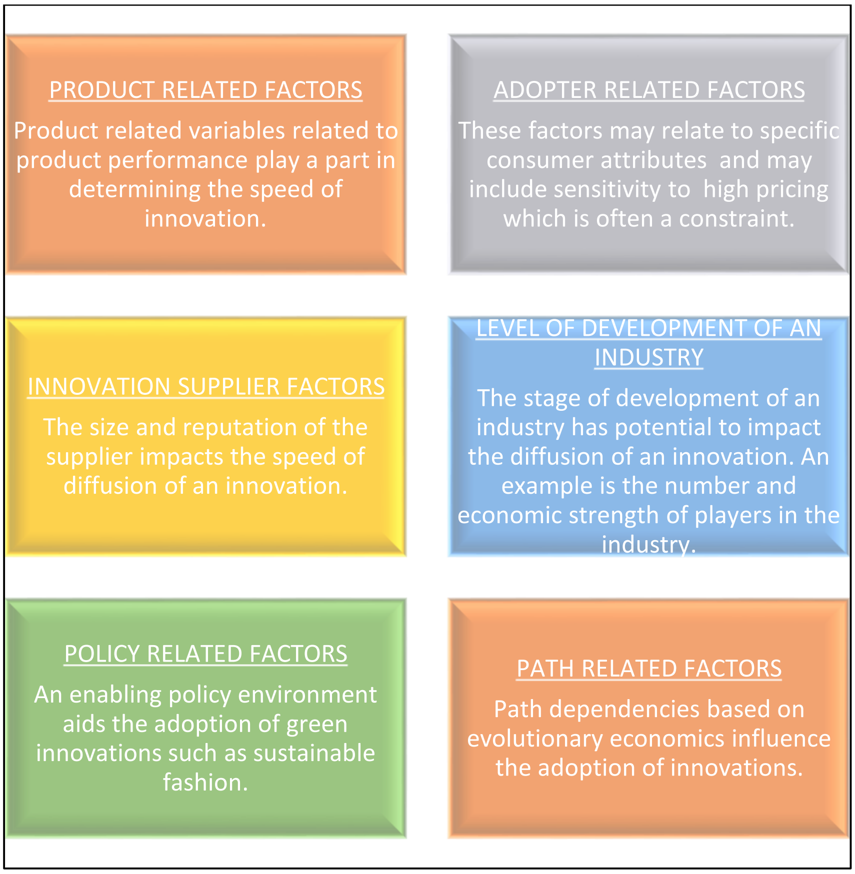


Figure 6.5: Factors influencing the diffusion of innovation in the green economy, Source, (Fichter & Clausen, 2021:36

6.6 The concept of value and consumer purchasing behaviour

The ability of a product to create value is the core purpose of economic exchange between individuals, organisations and countries (Paramasur & Roberts-Lombard, 2013). Values may be personal values, and these differ from consumer to consumer, and they satisfy the wants of the customer, which are usually of a more personal nature. Universal values aim to satisfy basic needs, but personal values are more specific to the higher motivations and needs of a consumer. In adopting green products, which values are taking centre stage? Is a product designed to address environmental challenges and with the focus being to safeguard the environment placed high on the priority list of consumers? The weighting of green products on the matrix shown in **Table 6.4** impact the consumers propensity to purchase the product. Green products must create value for customers to be successful in a way that makes sense and meaning to the consumer. In short, what value can green products or sustainable fashion create and how is that value communicated to customers?

	User	Payer	Buyer
Universal values	Performance value	Price Value	Service value
Personal values (Group specific)	Social value	Credit value	Convenience value
Personal values (Individual specific)	Emotional value	Financing value	Personalisation value

Table 6.3 : Matrix of consumer values relating to purchase decisions, Source: Paramasur & Roberts-Lombard, 2013: 37

As one rises up the income level, the value system of the consumer tends to change and the options available to the consumer in terms of product purchase options tends to increase. At the lower end of the income ladder, consumers are limited in their ability to try out new products and choose novel products mainly driven by affordability and pricing factors. This has implications for the purchase of eco fashion. Can a consumer who is battling to put food on the table in Africa especially in a COVID- 19 era be able to even consider buying clothing with a sustainability focus? This raises the question, can eco fashion be a universal product or is it just a niche product with a narrow appeal and likely to appeal to higher Living Standard Measures (LSM) consumers? The product choices available to consumers have increased exponentially in the fashion sector and continue to increase which makes it even harder for eco-friendly products to stand out in the mind of the consumer. The marketing positioning of the eco fashion product in terms of pricing and benefits is critical to understanding how consumers will engage and purchase sustainable products. A plethora of factors influence consumer behaviour.

Consumer behaviour is influenced by diverse external and internal factors as seen in **Figure 6.6** below.

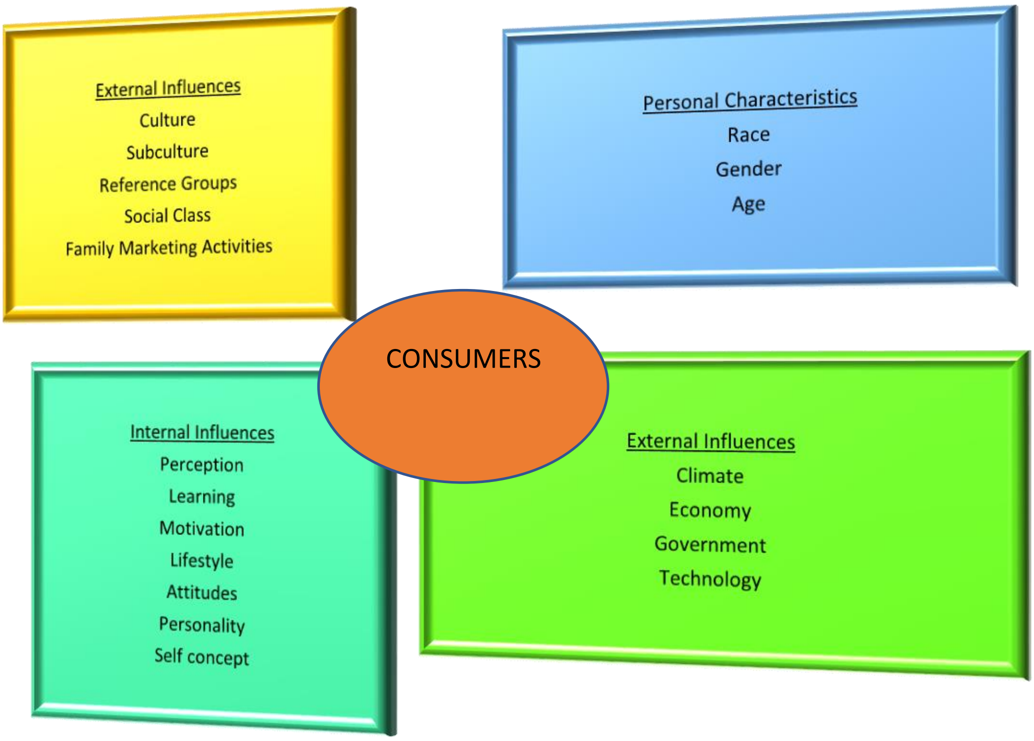


Figure 6.6 Model of Consumer Behaviour (Source: adapted from Paramasur & Roberts - Lombard, 2013)

The customer behaviour model promoted by Paramasur & Roberts – Lombard (2013) provides a framework to analyse the factors influencing consumer behaviour in various situations. The model shows the different factors, both internal and external, that play a role in customer decision making. External influences are referred to the social and group factors and influence customer behaviour. These external influences may include culture, subculture and social class but also may include factors like climate, economy, government, and technology. Similarly, there are internal influences that play a role in customer decision making and these include factors such as perception, learning, motivation, lifestyle, attitudes, personality, and self-concept. Personal characteristics like race and gender also play a role. The external and internal influences may vary from consumer to consumer, but they play a role. Is there a type of a consumer that would gravitate towards sustainable fashion? Sustainable fashion initially gained a following amongst environmental and socially conscious celebrities. Eco conscious consumers are more likely to seek out sustainable fashion and their ability to influence other consumers as fashion leaders plays a role in the growth of the eco fashion market segment. The cloudiness and haziness around green product messaging and definitional inconsistencies present a barrier to consumers switching to green products and a clear and coherent message around eco fashion would aid this(Caniato et al., 2012).

6.7 The customer decision making process

Paramasur & Roberts – Lombard (2013) outline the steps in decision making by consumers when deciding on a purchase. The journey from identifying a need to subsequent purchase is not a quick once off decision for a customer. The consumer decision making process is a sequential and repetitive set of psychological and physical activities ranging from problem recognition to post-buying behaviour. Customers are continually making decisions about what products and services to consume. In relation to clothing, the consumer has an array of options and must decide one way or the other. Will they resort to fast fashion options available at affordable prices or will they consider and buy slow fashion options like sustainable fashion? **Table 6.5** below highlights the complexity of decision making by consumers, with an example of buying a pair of shoes. The same process would ensue for any purchase including clothing. When deciding whether to buy a particular item, the consumer goes through all these processes and these processes would apply especially for high involvement products where the consumer takes time to consider options.

Problem Recognition	**Which shoe to buy**	**Which brand to select**	**How should I pay**	**Post buying evaluation**
NEED A PAIR OF SHOES	**FORMAL SHOES**	Angels	Cash	
		Froggie	Cheque Book	
		Hushpuppies		Satisfied?
	CASUAL SHOES	Angels	Master Card	
		Froggie		Not Satisfied?
	SPORTS SHOE	Nike	Credit card budget	
		Adidas		
		Reebok	Credit card straight	

Table 6.4 : Complexity of Decision making by consumers (Source: adapted from Paramasur & Roberts- Lombard , 2013)

6.8 The rise of green products and focus on the green economy

As environmental factors take centre stage in different regions of the globe, many product categories ranging from organic food, eco-friendly furniture, eco-friendly cars, and a whole lot more have emerged. In Malaysia, for instance, green fast foods are a growing phenomenon (Lee et al., 2012) and green products are seen as a way to differentiate products from each other. The hospitality industry has been a leader in the adoption of green products. Green hotels and restaurants have also been noted (Yusuf & Jamuludin, 2013). Electronic companies have also been at the frontline of the launching of green products (Salam, 2008). The rise of green buildings has also been noted. Green food has risen in importance, and this has been one of the sectors that has achieved popularity with the increased global push to more healthier activities and healthier food choices (Chen & Chai, 2010). Many companies have started green product strategies but there have been many obstacles to consumers adopting these green products. These include changes in consumer preferences, suspicion of green claims, consumer perceptions of green product categories and the high cost invested in developing green products. A study conducted in the EU in 28 countries investigating consumers' willingness to pay for green products or environmentally friendly options in various categories showed the intricate nature of the relationships between the different elements that influence consumer behaviour (Gregory-Smith et al. 2017). The study revealed the importance of psychological drivers in decision making and the complexities of the interactions that fuel consumer behaviour towards green products.

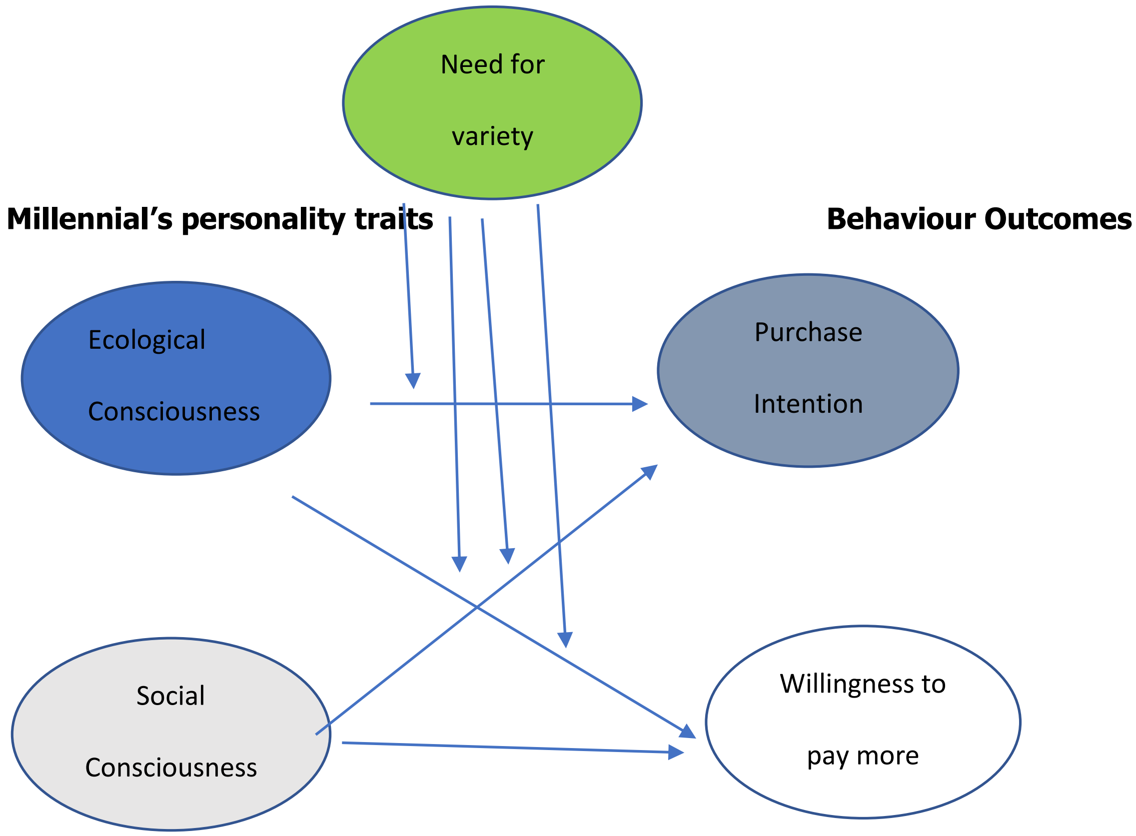
Eco fashion is an addition to a growing range of products focusing on the green economy. Only in recent years has there been a flurry of activity around the rise of eco fashion in different markets as sustainability debates intensify. The rise of the green economy has been espoused in other sections of this report, but it is worth revisiting now. There are many factors that have led to a focus on the green economy. The ongoing degradation of the environment driven by anthropogenic factors has put a spotlight on the need to safeguard the environment. The COVID-19 era in particular has seen an awakening of interest in the natural environment and the focus on the adverse impacts of humankind on the environment with the emergence of the coronavirus that has seen widespread tragedy. The circular economy is a key tenet of the green economy that focuses on restorative activities and has also become a popular concept sometimes considered in tandem with sustainability. Fast fashion has been an impediment to consumers adopting slow fashion. Fast fashion's detrimental impacts on the environment have been well documented. According to Karell & Niinimaki (2020) the fashion industry is a key polluter of the environment and is the second largest polluter after the aviation industry. The industry produces 8 -10% of global emissions and is a high-water user as well as generates significant waste.

6.9 Eco fashion and consumer adoption

Sustainable fashion is slowly taking root in different markets but especially in Asia and the Global North. A number of studies have been carried out to determine consumer attitudes to eco fashion in different markets. Shamsi & Siddiqui (2017) highlighted the rapidly accelerating nature of environmental degradation and that it was crucial to act to counteract it, stressing the important role played by green products as they reduce the negative impact on the environment. The study also found the importance of personal eco awareness or consciousness as a motivating factor to sustainable fashion consumption. The importance of advertising and promotion was also highlighted to increase awareness and to provide consumers with information on the benefits of green products. A study by Henninger et al.(2016) revealed insights relating to consumer behaviour towards sustainable fashion indicating that sustainable fashion is often seen as an 'oxymoron'. The findings of the research also revealed that the interpretation of sustainable fashion is context and person dependent. The data was collected in the UK and limited to a specific geographic region and may indicate findings specific to that region. An important implication for the research is that it is crucial to define sustainable fashion clearly and that small micro sized companies need to establish their sustainable fashion criteria so they can communicate them clearly in their eco collections to customers.

The literature to a greater extent agrees with the view that the consumer is not yet at the point that they would be driven largely by sustainability issues in their purchase decisions. A study of young consumers in Europe looking at their attitude towards recycling campaigns implemented by fashion brands revealed little interest from young consumers in recycling campaigns although they declared their willingness to participate in such actions (Grebosz-Krawczyk & Siuda, 2019). The study revealed the need for an effective marketing communication strategy when promoting sustainability and sustainable fashion. Consumers tend to ignore environmental messages unless they hear them repeatedly is my assertion. Young consumers in particular need to be targeted in campaigns relating to sustainability. Social norms are a strong determinant of consumer behaviour and a study in China revealed that face saving is important for Chinese consumers purchase of sustainable products and particularly because they are generally concerned with collectivism and do not want to shy away from social norms (Wei &Jung, 2017).

The sustainability movement has definitely gained ground (Shen, 2014). Shen et al. (2013: 4) point out that the consumer still has a long way to go before fully embracing the sustainability movement, 'Interestingly, prevailing opinion and extant evidence imply that consumers who are far removed from the debate centred on business practices have a substantial territory to become integral partners in the sustainability movement.' There are a number of factors that may account for this trend, but awareness seems to be the missing link (Shen; 2014, Shen et al. , 2013). There is a lack of knowledge of sustainable products which may account for the non-purchase or interest of consumers towards sustainability (Shen 2014, Shen et al., 2013). In a 2010 study, customers were asked regarding their eco fashion consumption, and they indicated that sustainable fashion products should be long-lasting and durable and made with high quality (Niinimaki, 2010). Style, colour, and fit were seen to be more important to consumers than environmental benefits . The eco fashion aspect was seen to be attractive if the product was attractive. As mentioned previously, millennials because of their eco consciousness and social consciousness are more likely to adopt eco-friendly practices (Fu & Liang, 2019) perhaps that explains why designers tend to focus on a younger demographic. Millennials are individuals who were born between 1981 and 1996 (Fu & Liang, 2019). Millennials purchase intention of eco fashion and willingness to pay more are related to their eco consciousness and social consciousness as shown in the conceptual model below developed by Fu & Liang (2019).



(Figure 6.7: Millennials and eco fashion purchasing behaviour, Source: Fu & Liang ,2019)

A limitation to the adoption of green products has been the multitude of terms used to describe green products as described in earlier sections of this report. The consumer may need to be significantly educated to really begin to navigate the landscape and options available in terms of green products including eco fashion or sustainable fashion. A study in the UK focusing on the way consumers understand sustainability revealed that there was confusion regarding how sustainability referred to fashion and there was scepticism about paying higher prices for organic cotton (Ritch, 2015). Awareness amongst young adults of sustainability in the fashion industry remains low (Perez & Dos Santos Lonsdale, 2018). Clear communication on the benefits and advantages of green products will make consumer's decision making in regard to eco-friendly products easier (Perez & Dos Santos Lonsdale, 2018). Labelling and company information help to achieve this as well and more needs to be done to provide clear, concise, and easily understood messages around green products including sustainable fashion. Negative beliefs play a part in the choice's consumers make with regard to product choices (Kim et al. 2013). A study in Korea revealed that negative beliefs towards fast fashion had pulled consumers to slow fashion (Kim et al. 2013). Originality and value were also seen as important. Some of the negative beliefs included poor performance, overly trendy styles, big store discomfort and inauthenticity.

Interestingly, the role of compassion in sustainable fashion consumption was investigated by Geiger & Keller (2017) and revealed that sensitivity to the suffering of others played a part in decision making. Consumers were found to be more likely to purchase sustainable fashion if they had high levels of compassion. The values of a consumer play a critical role in their product choices. In another study, hedonic values showed a consistently negative relationship to sustainable fashion consumption. Mckeown & Shearer (2019) highlight that while consumers are becoming more aware about sustainability and are concerned about it, this has not translated to the purchase of sustainable fashion products in preference to mainstream fashion products. This is referred to as the attitude – behaviour gap. They propose that celebrity influencers can be used to guide consumers to more sustainable behaviours and consumptions. The way the sustainability message is framed plays a key role in the adoption of sustainable fashion or eco fashion and how alternative purchase decisions are evaluated (Guedes et al. 2020).

Country differences exist in the way sustainable fashion is perceived and my observations in Zimbabwe and South Africa corroborate this. The difference between the Zimbabwe and South African market is the Zimbabwean consumer is very acutely price sensitive in a nation with high levels of poverty. Designers in Zimbabwe are starting to engage with issues of sustainability by launching eco-friendly fashion products but there is still a dearth of knowledge on the levels of interest of consumers and particularly against the backdrop of the COVID- 19 pandemic. The retail fashion landscape in Zimbabwe continues to evolve but has evolved to a rather price driven industry where price factors rather than trend consciousness is paramount.

The South African market considered to be the most sophisticated retail market in Africa has indications of designers launching eco collections and focusing on sustainability, but there is still a lack of clarity regarding consumer adoption and awareness of sustainable fashion. Poverty levels in South Africa are a very real concern and impact consumer purchasing patterns. The price sensitivity of the South African consumer has been made worse by the widening inequality gap. Interviews conducted directly with South African consumers were not possible during the lockdown period, but designers profiled in Chapter 5 stated that their consumers consider eco fashion or environmentally inclined fashion to not be a key consideration in clothing purchasing decisions. This may suggest a lack of interest or awareness or even purchasing power.

Online shopping has become a significant purchasing method and that is increasingly more important in the COVID- 19 era as lockdowns and social distancing rules deter consumers from visiting retail shops. The link between online shopping behaviours by consumers and their propensity to buy sustainable fashion has not been studied but it may present a barrier to sustainable fashion consumption as consumers may not be aware of the benefits that would accrue to them buying eco fashion as much as they would if they entered the bricks and mortar stores. The rise of China and the eastern region has allowed consumers to buy clothes at cheap prices. These fast fashion options have changed the landscape of the fashion industry dramatically with opportunities for adverse impacts on the environment increasing exponentially. The tons of clothing that are deposited in landfills and disposed of in ways that do not safeguard the environment has been a major criticism of the fashion industry. The impact of fast fashion on the environment has been discussed in other sections of this report and slow fashion while more durable is still too expensive for the customer especially in the less developed regions of the globe.

Consumers in wealthy countries are more likely to show a propensity to purchase niche products such as sustainable fashion. In poor countries there are significant constraints to the adoption of high-end products as the customer is usually more concerned with the battle to survive rather than the quality or durability or sustainability of their clothes. Economic difficulties play a part in the ability of consumers to really focus on niche products. Environmental awareness is usually better in higher income consumers and that plays a role in the ability of consumers to even think about purchasing sustainable fashion products. Zimbabwe has seen a rapid decline in the standard of living for the majority, although there is an emergent wealthy minority. Low quality clothing imports have flooded the market and fast fashion remains the dominant purchase option for the majority of Zimbabweans facing real financial pressures on disposable income. In South Africa, the consumer may have more leeway in terms of clothing options but the severity of the poverty challenge in SA is also worth noting. The wealth divide in South Africa is widening and the middle class is shrinking with a stark polarisation between the very wealthy and the poor. Sustainable fashion undoubtedly has benefits for the environment but the communication and marketing of these benefits to consumers may be missing. Matching fashion to environmental concerns may be too much of an ask for a consumer who is barely able to meet basic needs necessary for survival. Designers when asked how they felt their consumers rated environmental aspects indicated a moderate importance rating to no importance. The truth is in Africa poverty stands tall as a challenge reducing the importance of other considerations.

The global trend towards a more sustainable fashion industry has its visible beginnings in the launch of Esprit's eco fashion brand in 1991 (Thomas, 2008) but has only recently taken off to become more widely adopted as a design, manufacturing and retailing approach in the fashion industry, particularly in the Global North or more developed regions of the world. Within the Global South or developing world as well as in emerging markets, the sustainability concept is only just beginning to be taken seriously. South African designers face somewhat of a design, production and marketing dilemma relating to sustainability policies and adopting sustainable business models and launching eco collections as they pursue sustainability initiatives because of the low level of engagement and awareness of environmental issues of their customers. The South African consumer may perhaps be aware of the importance of environmental issues and in some cases is actively engaging with environmental issues but may still be far from placing environmental considerations at the apex of clothing purchasing decisions. This emerged in the responses of the designers who while stating that their consumers placed some importance on environmental factors in their purchasing decisions their interest was not that significant. The lukewarm engagement with environmental issues emerged in the designer surveys and telephone interviews as well as key informant interviews and this trend has also been corroborated in other consumer focused research from other regions of the world. There is still hesitancy in the manner in which consumers engage with and embrace sustainability issues relating to sustainable fashion. Lisa et al (2021) argue that consumer response to sustainable is not translating into actions by the consumer. The profile of the South African consumer is worth investigating in some detail in this chapter to interrogate underlying attributes and predispositions that may impact their adoption of sustainable fashion and particularly so in a South African context and in a COVID- 19 era.

There is an emerging market segment but can sustainable fashion move beyond the somewhat niche nature of sustainable fashion purchases currently to a more widely adopted fashion product or even to become a product with a mass market appeal. Can we estimate to any accuracy the percentage of the South African population that could buy sustainable fashion or even think about buying sustainable fashion? In a population of 58 million, what percentage of the population would be able to afford to purchase sustainable fashion or are even thinking of fashion along environmental lines and how important are pricing factors in sustainable fashion purchasing decisions?

While it was not possible to interview consumers in South Africa regarding their sustainable fashion purchasing behaviour as has been planned due to COVID- 19 restrictions, a picture of the consumer can be tentatively depicted from the designers. As mentioned earlier according to the designers in this research. environmental factors are not at the apex of consumer decision making regarding clothing fashion purchases and interest in environmental factors is moderate or lukewarm. The higher price of sustainable fashion presents a barrier to consumers who are reluctant to pay more for eco-friendly clothing. One of the designers stated decisively that to focus only on producing sustainable fashion would be to alienate the majority of their customers which does indicate hesitancy towards purchasing more expensive sustainably made clothing. It is also interesting to note that the designers analysed in chapter five had a strong leaning on the younger consumer and the under 40s and under 50s age groups. One designer focused on millennial customers expressly who have in other regions been more likely to be interested and to purchase sustainable fashion. Research in other markets has indicated that younger consumers are more likely to engage with issues pertaining to the environment and be more eco conscious. Small-scale designers also tend to price their products higher than the mass market fashion producers who focus on fast fashion and price their products much lower than the more exclusive small-scale producer. In a market like South Africa, pricing plays an important role in influencing consumer decisions and while consumers of more bespoke fashion are willing to pay more, they may not be willing to pay even more for sustainable fashion. The majority of the designers in the small-scale producer market are fairly young and new entrants to the industry which does mean that they may be more willing to engage with global trends such as a growing eco consciousness and could be influential in pivoting the fashion industry towards sustainability.

6.10 A social media investigation into consumer engagement with sustainable fashion

Social media has transformed the way we interact, connect, and generally live our lives in the 21st century. Consumer activity and interest can be tracked on social media in a way that was not possible before. Social media has also ushered in the opportunity to see how consumers respond to products on a larger scale and how product choices are influenced by social media. The rise of social media has allowed the exploration and interrogation of consumer behaviour regarding particular products, especially newish products still carving a position in the marketplace in a way that was not possible before the digital age and the hyper connected world that has been driven by globalisation. Ideally, I had hoped to speak to South African consumers directly, but this was hampered by the pandemic and the resultant restrictions. What I am going to try and do in this section is present consumer insights regarding eco fashion or sustainable fashion from mining data available on influential social media pages and largely on Instagram which has overtaken Facebook in popularity in many ways.

Social media can be a rich source of consumer behaviour insights relating to product choices and prevailing views and can illuminate nuances in how consumers perceive products. The rise of social media influencers who can drive the use and purchase of products or spread particular messages, ideologies and trends could become one way in which the message of sustainability in fashion could be more widely spread to consumers. We have seen in the recently ended COP26 United Nations Climate Conference in Glasgow that the messages spread on Twitter, LinkedIn, Facebook, Instagram and generally on the web have raised interest in the issues relating to climate change and climate policy and fuelled an appreciation of the urgency of environmental factors and the need to prioritise the safeguarding of our planet. As stated earlier, nine Instagram pages focused on sustainable fashion and six Facebook pages were identified, explored, and assessed based on indicators such as likes and comments to see how consumers really felt about sustainable fashion. The social media pages were identified using a keyword search using the words sustainable fashion or eco fashion and were limited to pages that promoted sustainable fashion or eco fashion as a concept or design philosophy and not focused on individual designers, except in the case of South Africa where I could not find a community page or forum page on social media specifically relating to building a community interested and engaging with sustainable fashion issues. To glean information on South Africa I looked at the social media pages of two environmentally friendly focused fashion designers specifically promoting themselves as sustainable designers, as well as the social media pages of H&M and Woolworths, leading retailers in South Africa, whose focus on sustainability has been very public, even in this COVID- 19 age. I also looked at the social media pages of five other designers who have risen to acclaim in South Africa to engage with the interactions and activities on their sites. The designers I looked at are Thula Sindi, David Tlale, Gavin Rajah, Palesa Mokubung and Marianne Fassler.

The table below is a list of the social media pages used to ferret out the leanings and behaviours of consumers in relation to sustainable fashion.

INSTAGRAM PAGES	**FACEBOOK PAGES AND GROUPS**
Sustainable Fashion Forum	Sustainable Fashion (Group)
Sustainable Fashion	Sustainable Fashion (Page)
Sustainable Fashion UK	Sustainable Fashion UK
Sustainable Fashion Daily	NYC Sustainable Fashion
Sustainable Fashion Matterz	Sustainable Fashion Scotland

Ethical Fashion Initiative	Sustainable Fashion Made in Africa
Ethical Fashion Guide	
Eco Fashion Community	
Eco Fashion World	

Table 6.5: Sustainable Fashion Pages Reviewed, Source: Instagram and Facebook search

Sustainable fashion is emerging as a key social media community favourite with many pages focused on it particularly on Instagram. The most followed page on Instagram focusing on sustainability in the fashion industry had over 200 000 followers garnering significant interest and really engaging with sustainable fashion in a detailed way by focusing on content that was in-depth, very creative, engaging, probing and often really scientific and really focusing attention on the crux of the sustainable fashion movement. A lot of smaller pages are also on Instagram but with significantly less numbers of followers but also with the aim of promoting sustainable fashion but there was a large difference in content strategy and engagement of consumers between the most popular page and other smaller pages. As I looked at the pages, I tried to get a feel of their content strategy as well as the ways in which their audience was engaging with them to really ferret out consumer sentiment. My focus when examining the nine pages focusing on building a community of sustainable fashion followers on Instagram was to get a grasp of the type of discussions that were occurring on these sites. I looked at recent posts (five latest posts) and the posts on the largest page focused on key sustainability themes relating to overconsumption and the perils of the fast fashion industry, thrifting and recycling, the difference between synthetic and natural fabrics with a specific focus on the environmental cost of fast fashion and the climate footprint of the fashion industry as well as green washing. The latest post on the largest social media page on Instagram relating to sustainable fashion had over 80 likes and was focused on recycling old clothes in a very detailed post that looked at the merits and demerits of recycling. There were no comments on the post. The previous post was focused on overconsumption and invited followers to post the questions they ask themselves when shopping in a fast fashion and overconsumption age. The questions shown below posted by followers on a post relating to overconsumption reflect interestingly quite a bit of thought and interest in sustainable fashion.

- Do I need it, and do I love it?
- Do I know anything about who made it? What is it made of?
- What will happen to it when I no longer want to wear it?
- Where will this garment be in 5, 10, 15 years?

The profile of the followers on this Instagram page is definitely of a more environmentally aware consumer because it is unlikely that the average consumer introspects their clothing purchases beyond do I like it and can I pay for it. Perhaps the average South African consumer is not yet at this level of introspection of their clothing purchasing behaviour but there may possibly be pockets of consumers who are. The general mood of the most popular Instagram page with the highest numbers of followers was of a deliberate focus on encouraging real discussion, introspection and thought regarding clothing purchases. Perhaps it is a bit difficult for us in the less developed world to envisage overconsumption or the explosion of fast fashion on the scale of the developed world yet fast fashion is a global trend. Fast fashion has without doubt arrived in Africa and South Africa definitely and overconsumption is more marked in certain segments of the wealthier South African market ,and also apparent in the 'cheap' fashion of questionable quality sold in bargain retail shops and in informal markets on the streets of African cities.

The most popular page on Instagram on sustainable fashion was by far the most comprehensive and really dived into detailed discussions and presentations on sustainable fashion with interactive live sessions with experts and reels (which are essentially short videos) that provided engaging content. The most popular page on Instagram engages with consumers in a number of different ways with varied content including a podcast and a newsletter and also hosts events and the posts were really detailed. The 8 other smaller pages focusing on building a community of sustainable fashion enthusiasts on Instagram had similar formats but with far less consumer engagement as seen in the number of likes and comments and furthermore the content on the pages with fewer followers was not as detailed as the page with the most followers Some of the pages on Instagram had other fashion brands liking their content and others had more individual followers. The sheer number of pages focusing on sustainable fashion on social media confirms that it is a rising trend and perhaps a global movement that is underway, although still rather muted in terms of social media promotion in the global south. The prevalence of interest and engagement by women followers on these identified sustainable fashion social media pages is evident with only a few males really engaging with the pages identified. I could not find any South African sustainable fashion social media pages trying to build a discussion forum or a community of sustainable fashion followers but there was one page with an Africa focus.

A review of the list of viewers on most of the pages was quite revealing and interestingly most of the followers were mainly white females. Additionally, it appears sustainable fashion has garnered interest with women quite significantly, with only sporadic engagement by males. On reviewing the next five posts after the most recent post on the Instagram site with most followers, the same trend also emerged. White females comprise a significant percent of viewers, more than any other racial group. On taking a closer look, the women who had liked the posts on these sustainable fashion forum pages seemed fairly young, possibly millennials and Generation Z.

I tried to find pages focused on sustainable fashion in Africa on Instagram but the sites I found did not really have significant numbers of followers. There was one called *Sustainable Fashion Africa* which had 43 followers and aimed at promoting innovation, technology, and sustainability in the African fashion industry and this page had more African and black followers but only two posts.

On the Facebook pages on sustainable fashion, I found a few groups that focused on sustainable fashion. One of the groups had 5100 members and another had over 17000 members. Reviewing the comments to the posts on these pages also revealed more interest from white followers and less engagement from other races. The number of likes on each post ranged from very few to over 450 and the Sustainable Fashion Facebook group on with over 5100 members appeared to be very popular and engages vibrantly with its followers with interesting posts. Most of the social media pages I found are based in a developed country which perhaps skews my findings to that region of the world, but as eco fashion has diffused from the more developed global north to other regions it does make sense that there is currently more engagement with the concept and applicability of sustainable trends in that region. It is very possible that in the years ahead we will see more Africa based social media pages promoting sustainable fashion in Africa as consumer awareness increases. There were less comments interestingly on the Facebook pages compared to the Instagram pages, but the number of likes generally on these social media pages showed that viewers were engaging with the posts and that these pages had loyal followers genuinely interested in sustainability. There was a page on Facebook focused on Africa, *Sustainable Fashion Made in Africa* , but there were few posts on this page and the page had only 58 followers. While there were many pages on Facebook on sustainable fashion, some had very few followers and again the trend of greater awareness and engagement with sustainable fashion in the developed regions like Australia and the UK emerged. The racial profile of the followers also showed more white and female followers.

To try and find out if I could get specifically South African views towards Sustainable Fashion from my social media investigation I looked at the social media pages of two designers reported in the media to have launched sustainable fashion brands and reviewed their pages to gauge interest. I also looked at the Woolworths South Africa Instagram Page as well as the H&M South Africa Instagram page because these two retailers have been very vocal recently regarding their sustainability focus and have flighted recent TV advertisements promoting their sustainable fashion ranges.

Fundudzi by Craig Jacobs launched in 2004 is promoted clearly as an ethical South African brand. Fundudzi's Instagram page had over 2000 followers and over 170 posts. The level of engagement of consumers on this page varied from 20 likes at the lower end to over 200 likes based on the last five posts. The posts were mainly photographs of designs made ethically for both men and women. While the Fundudzi social media page is a vibrant one, the number of followers suggest there this brand is still a long way to get to the 10000-follower mark considered to be the number of followers to reach to have influencer status but certainly their social media efforts appear to be a promising avenue to promote their sustainability focus.

The sustainability focused second South African brand that I looked at was called *Sitting Pretty*, a female focused ethical apparel brand located in Cape Town and Johannesburg. Their Instagram page had over 170 000 followers which does suggest influencer status and also reflects real interest and engagement by consumers and the last five posts had from 50 to 100 likes and the comments on their posts which showcased their collections and individual garments in live sessions seemed to appeal to consumers. On reviewing their follower profile, it was a fairly diverse mix, from individuals to other fashion designers and again most of the followers were white females.

I looked at the Instagram site for Woolworths South Africa and noticed a very recent post promoting their latest sustainability focused cotton collection with over 1000 likes and with quite vibrant consumer engagement signalling interest at least. Woolworths has had a noticeable sustainability focus. On reviewing the global Facebook page for H&M I also found posts with sustainability focus and deliberate mentions of the inclusion of circular principles in their clothing. Twitter is in many ways the most influential social media platform. I conducted a search on Twitter using the hashtag #sustainable fashion and #ecofashion to see what level of interest emerged or the number of tweets, there were quite a number of tweets and mainly from the global north reflecting a vibrant area of discussion or commentary but still more in the western world. TikTok is one of the latest additions to social media and has garnered increased usage and popularity relatively recently and yet already there is significant activity around sustainable fashion on the platform. I also watched a few videos on TikTok relating to sustainable fashion and my earlier observation that white females are at the forefront of sustainability promotion and interest is evident. Most videos on TikTok are by white females and to illustrate the level of interest in sustainable fashion TikTok videos with the hashtag #SustainableFashion had 1.5 billion views and those with the hashtag #sustainablefashiontips had 3.4M views.. Other sustainable fashion hashtags I found on TikTok include #sustainablefashionblogger, #essential fashion, #fashionsustainable, #sustainablefashionstore and #sustainablefashionweek. My social media investigation allowed me to review consumer activity around sustainable fashion on a platform that is increasingly driving consumer behaviour and confirmed, perhaps tentatively, that sustainable fashion is a rising influence on garment making practices, particularly in the global north and in the key regions that have driven fashion trends are mainly located.

Thula Sindi, David Tlale, Gavin Rajah, Palesa Mokubung and Marianne Fassler are leading South African designers who are active on Instagram, a rapidly growing social media networking site which in many ways has become the 'it' platform for celebrities and influencers steering away from Facebook which has become somewhat less popular. South African designers are on Instagram and using the platform to showcase their garments and engage with their customers. While there was quite a lot of followers on most of the pages there is still some way to go to really create unique and memorable content in some instances. The mere fact that consumers would choose to follow a designer's page suggests at the very least an awareness of the designer and interest in fashion in a deliberate attempt to keep updated on the latest collections of a particular designer as well as following other promotional gifts and offers.

6.11 Insights from consumer research

I was locked out of South Africa for the last two years of my study so could not speak to South African consumers but managed to survey consumers in Southern Africa. Regarding the importance ascribed to environmental factors when making clothing purchasing choices, the overwhelming number of the respondents I spoke to and engaged with in formal and informal discussions indicated that they did not consider environmental factors to be important in their clothing choices, although there were two respondents who had in-depth knowledge of environmental factors. One respondent intercepted in a parking lot of a mall was a fashion designer and a student at the University of Stellenbosch who in her own designs was incorporating sustainability trends. She was quite irate at the way overconsumption was destroying the fashion industry and stated that the fashion industry in Africa could pivot to sustainability, even in a market like Zimbabwe, where the cost of living is a significant challenge for the majority of the population. A respondent who had lived in Australia also had knowledge of sustainability factors. Seven respondents said environmental factors were of no importance to them when purchasing clothing. When asked what factors they consider when buying clothing the survey respondents indicated that durability, price, fit, and quality were important considerations. Price was frequently cited as an important consideration, and this is no surprise given the economic situation in Africa with the majority eking out a living on nominal salaries and with the informal economy and self-employment as the dominant type of employment. Three respondents indicated that they buy clothes twice a year and the rest stated their frequency of shopping for clothes as variable or on an annual and seasonal basis.

When asked where they buy clothing mainly, some respondents stated that they shopped in South Africa, others reported that they buy in the UK and US and some shop in Zimbabwe. Only two respondents had any knowledge of the existence of sustainable fashion brands and most of them did not know anything about sustainability and eco fashion. Regarding their awareness and knowledge of other environmentally- friendly products, only two respondents knew about eco cosmetics and organic foods. I asked the survey respondents how they disposed of old clothing and the majority gave them away. South Africa is definitely a popular option for those seeking to purchase clothing and there has also been an influx of fast fashion across Africa presenting cheap clothing options in many countries.

A growing interest in ethical fashion is evident in many different regions of the African continent and in regions away from Southern Africa and in other more northern African countries as well as in West and East Africa. The fashion industry in Africa is driven by fast fashion garments and cheap imports from China in many ways. This trend, coupled with the expensive nature of durable or slow fashion garments at the higher end of the quality ladder, creates a largely fast fashion focused industry in Africa.

6.12 Concluding Remarks

Sustaining consumer demand may be crucial to the adoption and diffusion of sustainable fashion in Africa. My social media investigation of consumer activity on sustainable fashion pages revealed vibrant engagement and interest in eco fashion in particular regions of the globe and perhaps by particular demographic profiles but nonetheless offered a glimpse into the rising influence of sustainability in the fashion industry globally. My investigation did not really reveal significant interest in sustainable fashion in Southern Africa albeit there may be some consumers who are engaging with sustainability. I am from Zimbabwe and price is a key consideration in clothing choices and cheap local clothing buying options are emerging and some consumers look beyond Zimbabwean borders to find affordable clothing. During the pandemic there had been a very noticeable influx of very cheap clothing of questionable quality into Zimbabwe sold by individuals and advertised on social media platforms. I have noticed dubiously shocking retail prices of 1USD for a dress which seem incredulously low, yet this has allowed everyone to be able to dress with flair and with confidence creating a city where fashion is a cultural indicator of wealth but allowing even the very poor to model their look on celebrity trends which is quite heartening. On university campuses there is a fashion consciousness that is evident. The ubiquity of social media has opened up the eyes of younger generation consumers in Zimbabwe to global fashion trends and online shopping has also allowed the purchasing of fast fashion apparel from anywhere on the globe.

We are living in a world that is hyper connected and extremely globalised and this has enabled consumer behaviour to mirror regions in the world seen as fashion leaders. For instance, you may live in Harare all your life but have your clothing choices driven by the media and closely resemble a New Yorker in clothing preferences. My assessment is that consumer demand is where the success or failure of sustainable fashion rests; there is clearly rising interest in sustainable fashion in Africa, but it seems to be more in regions considered to be fashion capitals like Johannesburg and other capital cities in Africa.

As mentioned by the designers I spoke to, South African consumers are price sensitive. The attributes peculiar to the South African consumer relating to sustainable fashion indicate a high price sensitivity which may be a critical trait impacting the propensity of a South African consumer to really engage with sustainable fashion. The other factors unique to South African society such as the strong immigrant dynamic, race relations, income and wealth inequality, the historical legacy of apartheid and other cultural and ethnic factors play a part in determining the likelihood of a South African consumer to engage with sustainable fashion. Global trends have indicated a hesitancy towards sustainable fashion by consumers and a greater likelihood of engaging with sustainable fashion by Generation Z and Millennial consumers and the impact of celebrity influencers may also be a contributing factor in that observation. The greater eco consciousness and social consciousness of the younger consumer may explain their greater engagement with sustainable fashion although this may not be the case in Africa where young people live in a markedly different context facing region specific challenges that steer them away from an engagement with environmental factors.

Consumer behaviour when making purchasing decisions relating to sustainable fashion in a number of markets has indicated that there is hesitancy by most consumers to try out sustainable fashion and before eco-friendly products become mainstream products. Many consumers remain hesitant to try out eco fashion limited by awareness, interest and most importantly by pricing which is often out of the reach of many consumers. Millennials and Generation Z consumers are more likely to act on their beliefs regarding environmental factors in the fashion industry (Blake & Callahan, 2019) and may be first adopters in sustainable fashion purchasing.

There are myriad factors that influence consumer adoption of eco fashion. The higher prices of eco fashion products is a significant barrier to consumers interested in sustainable fashion. There is room for educational initiatives and marketing programs geared to the consumer to learn more about the adverse environmental impacts of fast fashion and to be fully appraised of some of the social justice issues of the fashion industry. Social justice issues have plagued the fashion industry for years and the sudden onset of the COVID-19 pandemic highlighted the vulnerability of producer countries where job losses and industry closures left defenceless employees reeling in countries where options for jobs are severely constrained especially at the lower end of the market. This has often been a criticism of the organisation of the fashion industry that it does not fully protect the rights of those who make the clothes in the 'sweatshops' mainly in the eastern regions and countries like Bangladesh.

Eco fashion has not shown a normal growth trajectory given its roots in the early 90s. It has not progressed as would be expected for new products launched into a market. Less developed countries will likely take a longer trajectory to eco fashion than countries in other regions where there has been a quicker uptake but on the whole the adoption of green products is occurring at a slower rate in Africa than in other regions of the world. In many countries the rise of ethical fashion has been noted but has not always translated into consumer uptake.

The question of whether the consumer in South Africa is ready for eco fashion is a key tenet of the argument that seeks to bring clarity to the question of whether eco fashion is ever going to be a popular product in Africa and in South Africa . We live in a continent where poverty is in many ways a definer of the continent and cannot be divorced from any argument regarding purchasing patterns. Apart from the few countries in Africa where there has been consistent economic growth, the reality of Africa remains a reality of ongoing poverty and lack. In such an environment, clothing purchasing decisions are often very limited by the choices available and affordable options trump most other considerations with consumers gravitating to affordable fast fashion options. Questions of style and fit may be of concern to the rich but for the poor sometimes affordability is the priority consideration. Price is in many ways the key consideration when choosing what products to purchase across different product categories including clothing/fashion in Africa.

Can the consumer be persuaded to switch to more eco-friendly options? This may be the question that will determine whether eco fashion can become a significant component of fashion clothing categories in South Africa. Consumers often face a conundrum as they make choices regarding product. Sustainable fashion or eco fashion is new to Africa and has only recently reached South African shores. This may explain the slow adoption cycle by consumers which has been noted to some degree, but it is likely that pricing and awareness are also crucial factors. There may still be room for consumers to begin to fully engage with fashion from an environmental standpoint and this has been noted in other markets. Africa has a unique set of challenges that may prevent consumers fully committing to the purchasing of products made to safeguard the environment or giving any regard to environmental factors at all.

The interest and awareness levels of consumers may be the missing piece of the puzzle when discussing whether eco fashion is likely to be successful in South Africa. While the attributes of the consumer of fashion in the small-scale producer market indicates some engagement with environmental factors but a hesitancy to pay more for sustainable fashion, there is need for more research in the South African market with consumers to really form a decisive picture of how they are likely to respond to eco-friendly options. The data in this research does suggest moderate interest in environmental factors and the younger profile of the consumers in the small-scale producer sector bodes well for sustainable fashion. The low level of awareness of sustainability which has been observed in other markets needs to be addressed and researched in the South African context. What factors have kept consumers from adopting eco fashion products? Can these factors be changed at all? It is not possible to extrapolate completely all the findings on consumer behaviour regarding sustainable fashion from the global north, but they may provide some clues to the likely success of eco-friendly brands in South Africa. Consumer decision-making is a complex set of factors which may change but are influenced by myriad influences, both internal influences and external influences. Environmental sustainability has taken centre stage in the sustainability debates, but consumers seem to be interested in other types of sustainability aspects such as economic sustainability. Environmental factors may be no more than just an afterthought for consumers or may not even register as a consideration at all.

Consumers have a role to play in sustainability and any sustainability strategy should not underestimate the need for consumers to have a clear understanding of the terms sustainable fashion or eco fashion and that the messaging needs to be clear, understandable, and concise. It may be an uphill trajectory for consumers in South Africa to be convinced that sustainability and sustainable fashion should be a key consideration in their purchasing of fashion products. The external and internal influences impacting their decisions especially in the COVID- 19 era, need to be considered. The consumer is not a uniform entity, there may be consumers who may be able to afford sustainable fashion in South Africa, but this would most likely be at the upper end of the consumer market.

CHAPTER SEVEN

Sustainable fashion in a COVID- 19 era

7.1 Introduction

This chapter explores the impact of the pandemic on the fashion industry. With an initial introduction that delves lightly into global trends the next section then looks at the impact on the South African fashion industry (section 7.2). Global trends are then presented more robustly in section 7.3 and 7.4.

In March 2020, in the midst of my PhD research, the South African government took the decision to impose a stay-at-home lockdown in response to the rapid advancement of the novel coronavirus COVID-19. This was in line with responses from the majority of governments across the world, in an attempt to reduce social contact between people. At the time, no-one was certain how long this would last - the initial lockdown order was for three weeks, and this was extended several times and with different levels of strictness until way into 2021. What we are realising now is that instead of completely eradicating COVID-19, societies are having to find ways of living with COVID-19.

The immediate impact of the lockdown was felt by the entertainment, retail and manufacturing sectors, Workplaces were barred from operating for the first three weeks, and the economy took an inevitable slump. More directly, many people lost income and jobs, especially those on casual and precarious employment. The fashion and textile industry was obviously also affected by the shut-down as consumers were kept away. Yet while large-scale fashion and textile manufacturers and retailers have slowly begun to increase production and turnover, many small-scale producers whose business model relies on personal relationships with a small pool of conscious clients, have been hit especially hard.

COVID- 19 has shown that the fashion industry and many other industries need to be more aptly prepared for extreme events like COVID- 19 which can wreak havoc on the industry and sustainability. In the COVID- 19 era many industries faced an existential crisis. What will

COVID- 19 impact sustainability in the fashion industry focusing on the most vulnerable in the value chain? How vulnerable are global value chains to COVID- 19?

This chapter will begin with an assessment of the impact of lockdown on the economic sustainability of small-scale independent fashion designers. In particular, it will look at the resilience of this sector of the fashion industry and try and make some initial conclusions about the factors that contribute to their resilience - or increase their vulnerability to this kind of societal shock. The intention of the chapter is to do more than just chart the experiences of the sector in this unprecedented moment: rather, it is to consider the broader implications of such a massive and globally felt shock for questions of sustainability in the sector. The impact of the COVID-19 lockdown and economic depression across the globe have raised many questions about the nature of the global economy (World Bank, 2020), with some in power promising a new dawn (see e.g., Boris Johnson and Jo Biden), while others such as Greta Thunberg arguing that this should be a moment for pause and reflection - that this marks a turning point where humanity must finally confront its precarious relationship to nature. The initial part of the chapter will focus on the ways in which small-scale producers have coped (or not) with the immediate impact of COVID, the remainder of the chapter explores the attitudes of these small-scale producers to their sector in the next five to ten years.

As a final caveat, one of the (albeit minor) impacts of the covid restrictions was obviously the ability to carry out qualitative social research due to the social-distancing protocols. This means that I was unable to sit with my research participants in the way that I had hoped to: undertaking observations and open-ended interviews with them as I sit in their workshops or studios with them.

In this chapter the impacts of the COVID- 19 pandemic on the fashion industry are explored with a particular focus on highlighting the impact of the pandemic on the transition to sustainability in the South African designer fashion sector / small scale fashion producers. Impacts on the global fashion industry will be explored as well as impacts specifically relating to the South African fashion industry, South African small-scale designers and on sustainable fashion. The global review will be a synthesis of emerging impacts on the fashion industry in key centres of the fashion industry mainly in the global north.

Fashion designers in South Africa at the beginning of 2020 were faced with operating conditions and an economic and social climate that significantly shook their model of operation. The short-term impacts of the stay-at-home orders across the economy on the fashion sector was the loss of income, as customers initially held off on planned purchases. Some small-scale designers were able to adjust their businesses to mitigate for the loss in turnover e.g., through the sale of face masks, and through shifting production towards more home and leisure wear. Overall, across the sector revenues have declined (Urminova & Kusa, 2020) and despite the gradual opening up of the economy and the roll-out of the vaccine programme to all adult age groups, economic commentators are predicting fundamental structural changes in consumer behaviour and economic activity that may never revert to some prior 'normal'. Globally, the impact of the pandemic on the fashion industry continues to unfold. From Italy to Bangladesh, the pandemic has left the fashion industry reeling (McIntosh, 2020). The pandemic induced changes to business operating models and social interaction dynamics have had evidently adverse impacts on revenues and profitability across all industries including the fashion industry, characterising the year 2020 and into 2021 as difficult years for businesses of all sizes and operations.

The impact of the covid pandemic has hit the fashion sector especially hard, exacerbating challenges that already beset small-scale producers (which I have discussed in previous chapters), it also potentially opens up opportunities for some small-scale producers. The quest for sustainability in the fashion industry has also hit an unforeseen roadblock. The COVID- 19 pandemic has been an unexpected start to a new decade and has left many industries in disarray and in very shaky territory as they navigate difficult challenges in very uncertain environments. The virus continues to evolve with waves and variants of the virus presenting an ongoing threat to the fashion industry. The return of customers to the stores in South Africa and globally has led to some degree of normalcy but the virus remains a threat to consumers and social distancing and lockdown regulations remain in place. The mortality rate for the virus continues to rise and there are over 200 million confirmed cases globally and fatalities are over 4 million as of August 2021 (WHO, 2021). The advent of vaccines brings a ray of hope, but the trajectory of the virus remains uncertain as the vaccine rollout begins across the globe. The emergence of different variants of the virus further compounds the challenges posed by the pandemic. The availability and efficacy of the vaccines will impact the road to economic recovery in all countries.

Sustainability had become a key business and operational consideration prior to the pandemic and was a rising global influence but has faced headwinds of the virus and whether it will continue to be a priority after the virus is still uncertain as business priorities may shift to sheer survival and rebuilding of businesses shattered by the pandemic.

The COVID- 19 pandemic poses a threat to the viability of businesses in the fashion industry. There are real questions to be asked regarding the viability of small fashion design businesses and large fashion retailers facing viability challenges. The question whether the fashion industry can ever be sustainable has been raised. A web-based search for recent developments in the fashion industry during the COVID-19 pandemic conducted in mid-2020 and documented in this chapter revealed volatility and trepidation globally and many businesses faced an existential crisis.

7.2 COVID- 19 – Unfolding impacts on the South African Fashion Industry and small-scale fashion producers in South Africa

The COVID- 19 pandemic has been transformative and often catastrophic to industries worldwide. The South African fashion industry has felt the impacts of the pandemic and continues to navigate a difficult path as the pandemic remains uncontained. The designer fashion sector or the small-scale upmarket fashion boutique sector in South Africa was hit unexpectedly with the impacts of the pandemic in early 2020 when the strict lockdown rules and social distancing policies totally prevented face to face customer contact instore. In South Africa, the different levels of the lockdowns have continued to impact how businesses operate safely and even now as vaccine rollouts have begun. The move to online shops and e-commerce platforms was an early response by fashion stores in South Africa but came with the consequent decline in income and need to put digital and e-commerce platforms for small scale producers that had not already started trading online. Designer fashion stores in South Africa are largely located in urban centres and strategically located for consumer access so the lockdowns and shutdown policies were an initial blow to their mode of operation. They immediately experienced a reduction in consumer demand which hit their income and revenue targets.

Impacts on small scale producers described in Chapter five revealed that adverse impacts on small scale fashion producers were already being felt in the earlier phases of the pandemic with designers responding to the new normal as best they could. The loss of income was already apparent as the loss of sales revenue hit hard as well as a need to craft ways to sell their merchandise and to keep their stores operating in a changing environment while minimising closures and losses.

Designers who participated in the email survey outlined in chapter 5 provided an indication of the impact on their operations of the pandemic and reported disruptions to their day-to-day businesses but explained that through innovative thinking and a switch to digital models they had managed to keep working, albeit with significant customer decline and a greater focus on online retailing and e- commerce more generally. Despite the disruptions to their businesses brought about by the pandemic, the designers who participated in the email were trying their best to navigate a difficult situation.

The COVID-19 pandemic has disrupted the normal business model of the fashion industry impacting all levels of the supply chain and all types of producers. The sustainability focus of the fashion industry prior to the pandemic had become a growing influence especially in the global north. In the small-scale producer sector designers had started to engage with sustainability practices and incorporating more eco-friendly practices into their operations in differing ways paying particular attention to circular economy principles of reducing wastage and a more restorative approach to their practices and processes. The advent of the pandemic threw a spanner in the works and upset business operations raising the question of how sustainability would continue to be part of an industry in sudden disruption. A number of key impacts emerged across all the designers interviewed regarding their sustainability focus and the impact of the pandemic. There is a definite adverse impact on small scale producers in South Africa because of the pandemic and ranged from stalled sales and loss in income as well as switching to online selling and other innovative ways of reducing the spread of the pandemic.

Sustainability is still important to the designers interviewed and is an expressed business focus of some designers. It is somewhat unclear how their sustainability focus will be impacted in the long run, but they did express the wish to remain on the sustainability pathway. Online and e- commerce platforms are playing a key role in managing the new normal and in the effort of the small-scale producers to recoup sales. The future remains somewhat uncertain and economic stability remains a concern.

Individual designers interviewed regarding their pandemic experiences shed some light into how specifically their businesses had been impacted by the pandemic. Designer A reported that their buying cycle had been adversely disrupted but the pandemic has not been a significant jeopardy to the ongoing viability of the design business. The limited impacts on this business may be because of their business model which is focused on e-commerce and relies on partnerships and collaborations. This designer has moved away from South Africa managing their business remotely with selling and marketing partnerships with other retailers which has helped lessen the impact on income. The designer was upbeat about the future of their business despite the adverse impacts of the COVID- 19 pandemic and was trying to manage the adverse impacts of the pandemic as best they could. They were not at the point of the survey perturbed by the loss of customers instore and had switched to online fashion business models but did indicate that the pandemic had been disruptive and their focus on sustainability was still part of their ongoing plans. This emerged from all the designers interviewed. Sustainability remained important even in the pandemic age although perhaps as the impacts of the virus have continued, designers may have to deal with the immediate and crucial impacts of a loss of income focusing less on issues beyond economic sustainability.

Designer B reported that revenues and sales were impacted by the slowdown in sales during the pandemic, but the designer had tried to keep busy during the lockdown and shutdown periods to lessen the impact on the business. Designer C had managed to keep operating during the lockdown periods focusing on patterning and the small nature of their production team was an advantage allowing them to keep operating even during the strict lockdown phases. The lean structure of the business had helped cushion the business from the impacts of the virus to some extent. What is clear regarding COVID- 19 and the impact on designers is the way in which designers have risen to the challenge of the pandemic and changed the way they operate to meet changing circumstances. This is perhaps possible in the small-scale producer sector because of the way their businesses are already organised to operate with a small team and with a keen focus on individual garment construction and a slow fashion approach to garment construction.

An interview with an ethical fashion designer revealed the magnitude of the challenges and opportunities in the sustainable fashion sector and in making and promoting a sustainable fashion brand in South Africa before the pandemic as well as her views on the potential of sustainable fashion in the COVID- 19 pandemic era. The designer is no longer as actively involved in the fashion industry as when she started the brand but is still in a limited way still running her brand with an ethical fashion focus. Her motivation for starting the brand was to promote and empower the less fortunate and in particular disadvantaged women as well as her passion for fashion and background in economic development. Her philosophy for the brand centres around 'reimagining fashion' and as a producer to be an ethical producer promoting an inclusive and sustainable economy.

The fashion designer has showcased a number of different collections since inception and slowly introduced an ethical focus and was actively involved in promoting it until 2018. In the telephone interview, the definition of ethical fashion espoused by the designer considered economic sustainability, social sustainability, and environmental sustainability. One of the central tenets of the brand was to focus on 'clothing manufactured in a way that was considering the economic stability of people which meant creating jobs for people and paying them above a minimum wage or a living wage.' The safeguarding of the livelihoods of fashion industry workers or garment workers emerged as a theme that is strongly rooted in the values and focus of this brand. Additionally, the ethical focus of the brand also aimed to focus on the preservation of local skills in garment making. The ethical focus of the brand was slowly integrated into her collections, and she introduced sustainable fabrics slowly to her customers as part of every collection. With all collections customers were introduced to a new type of sustainably sourced fabric. Her sustainable fashion collection had a focus on specific locally produced sustainable fabrics. These included locally produced mohair and peace silk (where no silkworms are killed in the process of making the fabric). She also introduced hemp as a sustainable fabric.

Regarding customer interest, her experience was that customers didn't really care about ethical fashion in South Africa compared to other markets. In an effort to grow the ethical brand she sold and promoted her label in Europe in countries like Germany, France and Italy and those customers felt that the label was ethically produced and highly fashionable. In South Africa she pointed out that there was very little interest in her brand and customers were more interested in garments made of imported fabrics like polyester and they did not value or understand sustainability.

In response to a question on her opinion of the likelihood of success of a sustainable fashion brand in the pandemic era, the respondent indicated that there might be possibilities for the launch of successful ethical brands and for fashion businesses to have a more targeted sustainability focus if certain measures were introduced. She emphasised that the production of a sustainable fashion brand is expensive and stressed that it was necessary to ensure that ethical fashion producers were able to keep costs down to ensure that the retail price to consumers could be affordable. She highlighted that sustainable fashion produced cheaply might be successful even in a pandemic. She acknowledged that there had been an evident decline in demand for clothing during the pandemic and especially formal clothing as consumers switched to more relaxed apparel but there were opportunities emerging. The rise of online shopping during the pandemic was an opportunity for fashion producers to promote their ethical fashion brands according to the respondent. She pointed out that affordable sustainable fabrics were a good alternative for aspiring eco fashion producers pointing out that hemp was a good alternative as it is one of the cheaper sustainable fabrics.

She emphasized throughout the interview that sustainable fabrics were very expensive. She also highlighted that an active online presence by an eco-fashion or sustainable brand would aid marketing and visibility and that it was important to introduce customers to ethical brands in a measured and informative way as in many cases they had not really engaged with them and needed to be educated on their benefits and advantages.

All types of fashion businesses have been impacted by the pandemic, but certain types of fashion stores or precincts have been particularly affected. The different locations and formats of the fashion industry in South Africa have faced varying impacts on their income and other indicators of viability from the pandemic and some have been particularly vulnerable. The Johannesburg Fashion District's location in the inner city of the Johannesburg CBD and the nature of the customers they attract has been severely impacted by the virus. As outlined in Chapter five, the Johannesburg Fashion District has been hit hard by the pandemic with the cancellation of events and the drop in customers to the district posing a real threat to stores in the district. Many stores in the district face a real threat of closure and have had to find ways of keeping their stores open by switching to selling other products, selling face masks, closing temporarily, and letting go of staff. While the district remains open, it has had to adapt to the changing environment and experienced a marked changed in income, customer numbers and even the general ambiance and mood of the fashion district.

Designers have certainly considered sustainability issues and if anything, there appears to be more interest in interrogating their processes and seeing how they could be more sustainable particularly from an economic standpoint. The growing move towards a more environmentally focused fashion industry has reached South African shores as discussed in

Chapter 5 and while the pandemic has been an unexpected challenge it may be possible as normalcy slowly returns or in the new normal to focus more intently on a sustainability pathway. While consumers are still hesitant regarding their engagement with sustainability the designers are incorporating sustainability into their processes and in the age of the pandemic that is unlikely to stop altogether but will be tempered by the very real economic challenges of keeping their businesses economically viable and avoiding bankruptcy.

Figure 7.1 – Impacts of the pandemic on the South African Fashion Industry

During the pandemic, South African fashion designers have benefited from the initiatives of the African Development Bank meant to promote and raise the profile of African fashion. The bank has an expressed focus on entrepreneurship. Initiatives to promote sustainability have also been a key part of these programs as the interest in sustainability has spread throughout the continent even into the more northerly regions of the continent. The African fashion industry has been identified as a key focus industry for the continent by the bank (African Development Bank, 2020). Initiatives aimed at promoting and growing the African fashion industry have been cascaded across the continent although many fashion events and meetings have also been postponed during the pandemic. A positive impact on the African fashion industry of the pandemic has been the promotion of locally produced brands and local sourcing of raw materials. A digital platform called *Fashionomics* has been launched by the African Development Bank focusing on African fashion and with the aim of helping fashion designers in Africa grow their businesses. The platform will be used for sharing ideas and growing the profile and profitability of the industry against the backdrop of the virus and beyond (African Development Bank, 2020). *Fashionomics* is an African development bank initiative to increase the ability of fashion entrepreneurs to access markets through ecommerce, boosting their access to finance and also makes available technical and business skills and strategic partnerships. Sustainability is a key theme on this platform with webinars and other online events also focusing on spreading the message of sustainability in an industry fighting for its very survival as the virus remains a threat!

Figure 7.2: Fashionomics (An African Development Bank Initiative), Source: Fashionomics Africa

The fashion industry in South Africa has felt the adverse impacts of the virus and ongoing efforts are being made to safeguard and protect the industry. During the severe lockdown periods, many clothing shops were closed as stores had to comply with COVID- 19 restrictions (Moloi-Motsepe, 2020). Many businesses have had to be restructured for continued survival and the industry has also responded to the pandemic by shifting to digital platforms and key fashions events such as African Fashion International (AFI) Joburg Fashion Week were completely digital in 2020 (Moloi-Motsepe, 2020). Sustainability has certainly come on the radar of African designers and policymakers and a webinar with an express focus on sustainability in the COVID- 19 era was held in 2020. The African Development bank has taken a frontline role in the quest for a more successful, sustainable, and equitable fashion industry in Africa.

Figure 7.3 – Fashionomics Africa Webinar Series on COVID- 19, Source : African Development Bank

7.3 The direct impacts of COVID- 19 on the fashion sector

The impacts of the COVID- 19 pandemic on the global fashion industry continue to unfold but indicate disruption to business operations in different regions of the world and raise key questions relating to sustainability in the global fashion industry particularly relating to economic sustainability as well as social justice misalignments. The global fashion industry has been hit hard by the COVID- 19 pandemic. The unexpected and immediate nature of the shutdown or lockdown orders left businesses at a loss on how to proceed and with the urgent need to transition to e-commerce platforms. In this section the impact in selected regions is reviewed showing similarity in the nature of impacts in the disruption to sales revenue, impact on employees and ongoing uncertainty but also highlighting some positive developments as fashion designers innovated and adapted to a changing operating environment.

Urminova & Kusa (2020) emphasise the negative effects of the virus on the global fashion industry but also stress that the virus has had a positive impact in some cases. They conducted research in Slovenia from September to October 2020 which showed a marked change in consumer behaviour regarding fashion purchases in the COVID- 19 pandemic era resulting in a reduction in overconsumption typical of the fast fashion era. Consumers had reduced their purchases of clothes indicating that they preferred to buy in the brick-and-mortar shops rather than the online shops which had become the norm in the pandemic era. The negative effects of the coronavirus have been felt worldwide (Urminova & Kusa, 2020).

The impacts on the global fashion industry indicate a world grappling with an unfolding and uncertain crisis and the coronavirus presents a real threat to the fashion industry, one of the world's most visible industries. Lockdown restrictions and social distancing rules have changed how consumers dress and buy clothes, beyond that the actual organisation of the supply chain and the value chain has revealed serious flaws prejudicing poor countries where production takes place and favouring countries that have more clout in the chain. Some feel that the coronavirus pandemic presents an opportunity and a crisis for the fashion industry. The tragic numbers of layoffs, and store closures have affected employees at every step of the fashion value chain. The reality of the vulnerability of poor garment workers in the east and their labour rights have been highlighted by the pandemic.

Job losses have been one of the unfortunate impacts of the global pandemic as companies scale down production in response to reduced consumer demand. According to the International Labour Organisation (ILO) the COVID-19 crisis will affect millions of jobs in the global fashion industry (UNECE, 2020). A survey of 700 companies revealed that orders had dropped by 31%. In Bangladesh over 4 million workers jobs are at risk (UNECE, 2020). The pandemic is an opportunity to shift to more responsible value chains and adopt a more responsible business model. The transparency and traceability of the supply chain needs to be vastly improved protecting the most vulnerable workers.

Fashion models have also been affected by the pandemic as they depend on fashion shows, fashion weeks and editorials to survive (Firstpost, 2020). Problems embedded in the industry around race and social justice have been exposed with newer, younger, and black and coloured girls being most affected and more vulnerable and have been more affected by shutdowns in this era.

The impact of the coronavirus on the fashion industry is likely to be catastrophic. A review of selected recent news articles and social media posts from January 2020 to June 2020 since the advent of the COVID- 19 pandemic in Wuhan, China revealed an industry severely disrupted and facing an uncertain future while trying to keep operating resiliently. What is evident is that the industry will not remain unscathed and that there will be a tough journey to recovery for those small designers in particular who are able to survive the virus. While the outlook is grim in most regions, some reports indicate positive developments. The lockdowns and subsequent effects have provided an opportunity for creative thinking around sales generation and has focused brands to look locally for raw materials and also led to the creation of platforms online to share information and build connections in a tough season.

The virus was a sudden occurrence and there was no time to prepare for the outcomes for the fashion industry. Suddenly the world was thrust into a catastrophe and the effects on the global fashion industry were almost immediate. The challenges already facing the industry of viability and market access against the backdrop of the virus are set to worsen. The African fashion industry has also lagged behind in its adoption of ecommerce and technologies to operate fully online. As restrictions ease, will the industry be able to recover at all? Reports from different regions of the world indicate an industry that may have to fight for its very life to remain viable after the virus and during a season that has been challenging and that is not yet known when it will end.

Figure 7.4 (COVID-19 and the fashion industry – emerging impacts, Source: McIntosh, 2020

The diagram (**Figure 7.4**) above draws attention to some of the key impacts of the novel coronavirus on the fashion industry globally reported in early 2020 at the onset of the pandemic and as the industry began to grapple with an operating environment that had been radically transformed. According to an article by a BBC reporter in April 2020 there was a sharp decline in sales in the global fashion industry as the COVID- 19 pandemic struck because much of the world's population was not able to travel or socialise due to social distancing and lockdown rules (McIntosh, 2020). The coronavirus outbreak has been devastating to the industry in many ways. In many countries production has ceased, retailers have closed, and demand has plummeted all indicating a fashion industry in distress. Imraan Amhed,, the founder and CEO of the Business *and the Fashion, describes the situation as follows, 'It has led to real existential crises for the fashion* industry' (McIntosh, 2020).

The retail industry has been one of the industries that have felt the brunt of the effects of the pandemic on business operations as lockdown rules and social distancing have led to a change in how consumers can access their stores. Retail and physical retail is still a very important component of the fashion industry and when stores are shut down or operate online the whole sales quota is completely changed (McIntosh, 2020). The severity of the COVID- 19 crisis has led to fashion being reduced to a very low priority in consumers mindsets. The fashion industry in Europe has requested aid amid fears that half of the sector could be wiped out by the corona virus outbreak (Elan, 2020). An emergency fund has been created but the amount announced was meagre in light of the sum needed to help smaller fashion retailers in particular. A total of 1 million pounds was made available and there have been repeated calls for more funds. The threat of closure has created an uncertain and tense atmosphere and fashion designers have had real losses. The pandemic has forced the whole industry to question how they operated. The unexpected nature of the pandemic did not give fashion designers any time to plan to operate differently and they had to pivot to e-commerce and other online and remote selling options immediately. This led to losses in revenue and impacted their businesses very survival leaving many in the very throes of bankruptcy and imminent closure. The whole supply chain felt the effects of the virus leaving a fashion industry shaken and facing a very uncertain future.

There has also been a change to the calendar of events and other cycles of the fashion industry which have come under scrutiny with the advent of the COVID-19 pandemic (Williams,2020). The effect of the pandemic is expected to last long after the pandemic is over. Fashion masks necessary for safety in the coronavirus era have become a fashion statement and an expression of individual fashion identity and creativity. Some designers have started creating matching outfits.

Figure 7.5: Fashion creativity in a COVID- 19 age, Source: elle.com

The European fashion industry has been impacted by the pandemic. It is estimated that the COVID-19 outbreak may cause a 50% drop in sales and production for the European textiles and clothing sector (Euratex, 2020). Eurostat data showed that the European textile clothing manufacturing went through a difficult year in 2019, despite good retail sales and export performance. This trend was expected to worsen in 2020 due to the pandemic outbreak. An ongoing Euratex poll with its members shows that 80% of companies are already laying off workers, more than half expect a drop in sales and production by over 50% creating serious financial constraints (Euratex, 2020). Data for 2019 show an economic slowdown in Europe with manufacturing remaining under pressure from Brexit and trade frictions. The pandemic has negatively impacted the industry and the **Figure 7.6** below shows the major areas that have been impacted in Europe. Will the industry survive to see a new day even as lockdown restrictions are lifted? As waves of the virus continue, the threats to business viability remain in 2021. A third wave is expected that may result in more lockdowns and social distancing restrictions all leading to adverse impacts on the fashion industry.

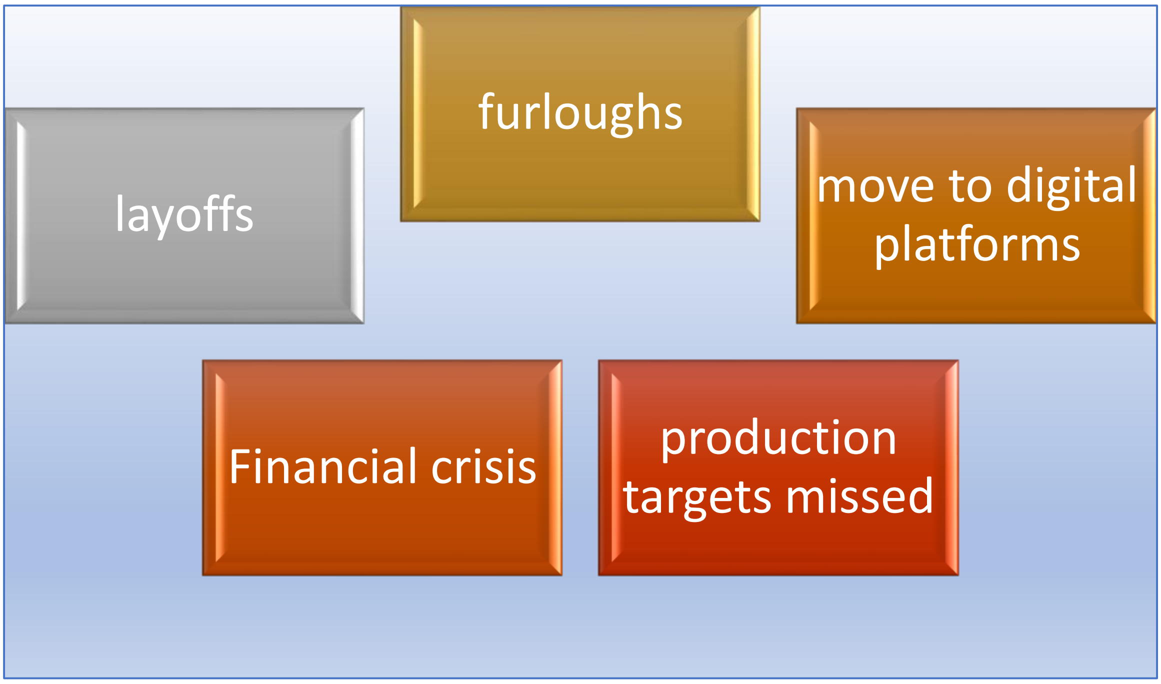


Figure 7.6: Impact of COVID- 19 on the European fashion industry, Source: Euratex, 2020

The European fashion industry has been impacted by the virus in many ways as shown in **Figure 7.6** ranging from layoffs and retrenchments to furloughs, a move to digital platforms and the missing of production targets as a real financial crisis unfolds for most business owners in the industry and particularly hitting hard smaller operators which comprise the majority of fashion businesses. In Australia similar effects of the virus on the fashion industry have been recorded. The worldwide fashion industry has been and the fashion industry in Australia has been no exception reporting numerous impacts (Boland & Lloyd, 2020). Digitalisation has had to be speeded up in response to the closure of brick-and-mortar shops and designers have moved to digital platforms in Australia. The impact on resource management has also been apparent and resource usage is closely monitored, and local suppliers and manufacturers have become more critical. Prior to the pandemic in Australia there had already been increasing concern on the environmental impact of the fast fashion industry and Australian designers were already facing lowering consumer demand (Boland & Lloyd, 2020). The advent of the pandemic has not helped a fashion industry already facing challenges.

COVID- 19 will have a long-term negative impact on the global fashion industry (Vogue Australia, 2020). Changes to consumer behaviour have already started being noticed. The immediate impacts of COVID- 19 on the global fashion industry have been devastating. It is expected that the industry will change forever . The creative focus and artistry will change and is already changing. Consumer values and retailer behaviour and a move toward slow fashion rather than fast fashion may also happen. Consumer shopping values may shift becoming more principled and spending habits fuelling demand side transformation of the industry.

Contrary to woeful expectations of downturns, the New Zealand fashion industry forecasts that the pandemic will bring positive change to the industry (Wardecki-Locke, 2020). 'A new normal' is expected which will likely include changes to the supply chain and opportunities to redesign the supply chain. A boost to local production is also expected and more promotion of locally produced fashion. **Figure 7.7** outlines some of the impacts on the fashion industry in New Zealand and interestingly there was an upbeat air in some circles realising that the pandemic could be an opportunity to focus on the local industry and make changes to the supply chain. The opportunity to focus on local industries is an opportunity in the COVID- 19 age as the global market remains inaccessible or rather difficult to access with the wide-ranging restrictions imposed by the virus.

Figure 7.7: Impact of COVID- 19 on the New Zealand fashion industry, Source: Wardecki-Locke, 2020

The impact on production has also been apparent and low cost overseas production hubs like Vietnam, China and Bangladesh are facing their own challenges due to local restrictions (Wardecki-Locke, 2020). Additionally, there is also a focus on fashion brands with long production runs rather than smaller production runs which disadvantaged the small fashion companies. A recent article by Katie Silver of the BBC revealed the impact on small fashion brands of the COVID- 19 pandemic in Asia (BBC, 2020). A founder of a Malaysian fashion brand indicated that sales had dropped and by half. Undoubtedly the coronavirus has had an impact on fashion brands of all sizes. Reasons for the sales decline include lockdowns in China which disrupted the supply chain. The traditional spike in sales in the Eid period was not the case in 2020 because of COVID-19 and has really impacted business owners. The outlook for the fashion industry has been severely impacted by the virus. Markets have dried up because of the lockdowns in many regions.

Italy was one of the countries that was severely impacted by the pandemic globally and the impacts on the Italian fashion industry has also been reported. A website dedicated to the retail industry in Italy reported that after the adverse effects of the pandemic lockdowns there were signs indicating recovery in the Italian fashion industry (Retail customer experience, 2020). Italy is a key centre of the global fashion industry and was one of the countries most affected by the coronavirus and retail chains shut down but as the lockdowns are eased, there has been some recovery. The easing of lockdowns has allowed some businesses to start operating.

A report from the Boston Consulting Group (BCG, 2020), revealed unfolding insights and key trends on the impact that the COVID-19 era is having on the fashion industry. The coronavirus has been catastrophic to the industry, according to the report, and there has been a surge in online shopping and store closures have hit the industry hard. The consumer's focus on online shopping has also increased. The report also highlighted the transformative impact of the virus on the global fashion industry and the rising influence of sustainability in the industry. The fashion industry is unlikely to remain the same in the post COVID-19 era and sustainability will most likely be more important and have greater influence as consumers seek brands with a purpose. According to the report more than four in ten US consumers say they expect brands to offer discounts or other promotions once stores reopen. While lockdown restrictions have been softened in many markets, the danger of the COVID-19 pandemic will still keep some consumers away from the stores even as vaccines are rolled out. Consumers are also very fearful of the future and particularly as the pandemic has had an impact on household finances.

The impact of the virus on the fashion industry has been felt across Africa. A study in Ethiopia with female ready-made-garment workers employed at Hawassa Industrial Park (a flagship economic zone) before the pandemic hit revealed the adverse effects of the virus on the garment industry (Meyer et al., 2021). The employment profiles of the industry had already been impacted in the early days of the virus. There were significant changes in employment status because of the pandemic. 41% of respondents employed at the industrial park in January 2020 were unemployed or terminated by the time the survey was conducted between April 28 and July 2020 and many of the respondents had migrated out of Hawassa and none of them had found new employment. Migration was identified as a major coping mechanism but there were significant barriers to migration including fear of health risks and resources.

A Mckinsey coronavirus update report on the fashion industry also corroborated the views of the Boston Consulting Group (Mckinsey, 2020) highlighting that the fashion industry has been severely impacted by the virus and will need an overhaul and a complete reimagination of the industry. The expectations of a recession were also pointed out. A recessionary market expected after the virus would need the industry to change its operating model significantly.

More recently, the Mckinsey State of the Fashion Report 2021 stresses the unprecedented nature of the year 2020 as the pandemic shifted business operations significantly (Mckinsey, 2021). The catastrophic nature of the pandemic on the fashion industry is highlighted. According to the report, the global fashion industry's profit is predicted to fall by 93% in 2020 and digitalisation expected to increase. Digital channels are expected to play a more important role in the industry in response to persisting lockdowns and social distancing rules. Uncertainty is expected to continue to prevail in the industry and fashion businesses will be expected to adapt their operations to manage an unclear environment. The report also draws attention to the pivotal role that sustainability will play in the industry as factors relating to worker's rights and environmental conservation will play a more pivotal role in the industry. It is predicted that 2021 will continue to be a year of uncertainty for the fashion industry. Predictions that sustainability will play a more important role in the fashion industry after the virus may be possible but what is certain is the impact of the virus of fashion business operations. Sustainability may actually become more important after the virus. The age of fast fashion may face competition from a move to more durable and lasting fashion products made in a more sustainable way. The way consumers think post the virus will change either by necessity or as a conscious move to a future that safeguards the assets of the environment.

The fragility of the fashion supply chain has been highlighted by the coronavirus (Lewis, 2020). Inequalities inherent in the industry have been exposed with the poorest shouldering the heaviest burden of the negative effects of the virus. The coronavirus began in China and lockdowns immediately impacted the rest of the supply chain as China plays a pivotal role in the global fashion industry. The supply of raw materials by China to countries where production takes place was disrupted resulting in factories being closed in the producer countries and layoffs in countries where poverty is already a significant threat to livelihoods. Mass cancellations of orders and refusals to pay for completed goods in many regions have left producer countries in dire straits resulting in job losses for garment workers and viability distress for businesses.

As highlighted in the literature review social justice concerns have been raised repeatedly in the fashion industry and the virus has highlighted where the power lies in the supply chain. Supply chains are designed in a way that benefits the richer countries who can make decisions at will that impact the lives and livelihoods of garment workers with little ability for recourse. Garment workers in the producer countries are not protected from unfair contracts and will always be unfairly impacted in situations of crisis which has long been a criticism of the design of the global fashion supply chain. Rich countries use low-cost producers in very poor countries and do not adhere to humane labour practices which is now clear as the impact of the virus becomes clear.

It is clear that the COVID- 19 pandemic has impacted different regions of the world and with some regions feeling the brunt of the pandemic more than others. The question of sustainability which prior to the pandemic was a rising influence is still an issue that is expected to remain pivotal in the COVID-19 age and beyond. The shortcomings of the fashion industry highlighted by the pandemic have shown that economic, social, and environmental sustainability must be a key component of the way that the industry operates. Economic sustainability has risen to the fore as revenues and income have been hit hard by the pandemic. Questions that may need to be interrogated regarding the economic viability of the sector is how to safeguard the industry's future and make sure that future shocks do not hit the industry as hard. Similarly, social issues that have plagued the industry need to be dealt with to avoid the unfortunate impacts on the most vulnerable in the supply chain like garment workers. Environmental issues also need to be incorporated into the way the industry operates with a greater focus on eco-friendly practices and processes. COVID- 19 has certainly shone a spotlight on the fashion industry and is an opportunity to redesign the industry with a greater focus on sustainability.

7.4 A move to digital

The digitalisation of the fashion sector has been more rapid in the pandemic era. The move to digital channels has been a hallmark of the pandemic and offers brands opportunities to build and grow brand equity by using social media and capitalising on the rise in usage of social media during the pandemic (Dubbelink et al., 2021). The role played by social media and technology has changed during the COVID- 19 pandemic with an increase in the time spent by consumers online, the rising usage of e-commerce platforms and overall, the communication and marketing opportunities of this media increasing exponentially. Social media platforms like Instagram and Twitter have become the sites of vibrant dialogue and engagement between different parties influencing purchasing behaviour significantly. Social media has played an increasingly pivotal role in the fashion industry particularly with the rise of social media fashion influencers who are usually at the forefront of the latest trends and have power to influence the trends and the type of fashion choices of particular customer segments. Instagram, in particular, has been used by advertisers to promote products and trends in the fashion industry and with Instagram influencers becoming more active and visible. Instagram users and brands with high numbers of followers have a strong ability to sway the direction of fashion trends. Tik Tok has also emerged as a formidable social media platform during the pandemic. To tap into the consumer and advertiser activity in the fashion segment during the pandemic I decided to review and analyse Instagram and Facebook pages of fashion related businesses, influencers, and organisations in mid-2020 revealing a number of interesting trends relating to the way the industry presented and reported on the pandemic's impacts and how brands and individual fashion designers were using the different social media platforms to promote and reinvent their brands. I started by looking at big fashion brands and their social media strategy during the pandemic which was interestingly similar in presenting an optimistic air and trying to keep the focus of the consumer on fashion and beauty related posts. Small scale producers also increased their activity on social media platforms showcasing their wares and promoting products and South African designers were also active on these platforms. The role of social media sites in influencing purchasing choices took a very evident upturn in the pandemic age with celebrity endorsements and promotion of brands increasing and with fashion events showcased online.

The light-hearted nature of posts during the more stringent phases of the lockdown was evident. Posts on the Vogue Britain Instagram page revealed a very upbeat approach veering from the current malaise and expected downturn in the industry. Instead, there was posts celebrating COVID-19 heroes of the pandemic and bringing good new stories expressing solidarity with events such as the *Black Lives Matter* Campaign campaign fuelled by the death of George Floyd in America in a brutal attack by a policeman which precipitated an anti-racism campaign with global reach. Fashion related posts continued to be featured on their pages with brands directing consumers to e-commerce platforms and also encouraging them to engage with the brand in different ways with different calls to action.

The Vogue Australia Instagram page had some mentions of the pandemic but steered from engaging with the full gravity of the virus and still maintained a light-hearted and playful approach which is usually associated with fashion posts in a social media space. There were a few posts which alluded to the virus focusing on the lockdowns and activities related to staying at home but very little mention of the seriousness of the virus in most posts. The problem with fashion is that it can so easily be relegated to a topic with a very light-hearted imagery and its economic effects downplayed serving mainly to create an image and an excitement. The association of the industry with celebrities and their ongoing personal and public debacles has not helped create the image of an industry that has the ability to really contribute to economies, so it is very difficult to associate it with the virus and its very real catastrophic nature.

The *Glamour* magazine UK Facebook page had no mention of the virus during this period, but the posts had the same fashion and cosmetic posts which is rather unusual. It is hardly likely the fashion is uppermost in the minds of consumers at a time when their incomes are under pressure and opportunities to leave the house for social reasons are not available at all. British *Vogue* Facebook Page revealed a tone that was more sombre with posts that engage with the virus effects from a reflective and realistic angle. The posts are still predominantly light-hearted but not without allusion to the virus. South African social media pages of key fashion influencers also reflected a light-hearted focus steering away from a serious portrayal of the pandemic and how it will affect the industry but seeking rather to present an optimistic outlook. The usual fashion models and celebrity trend focus has not changed.

The *Cosmopolitan* UK page also had no real focus on the pandemic and its impacts but comprised light-hearted content in line with the brands positioning. Similarly, Grazia UK and other global versions of the Grazia magazine also steered away from focusing on the pandemic. While social media has been downplaying the virus in a bid to remain optimistic , the advent of sustainable fashion social media posts on sites such as Instagram, Facebook and Twitter has been instrumental to spreading the sustainability message. In a web search, I discovered quite a few social media accounts with a focus on spreading content specifically on sustainable fashion and engaging with their followers on sustainable fashion issues. Sustainable fashion has become a media favourite and increasingly so on social media sites and sustainable fashion has become a favourite for bloggers. The emergence of sustainable fashion blogs has been instrumental in spreading the sustainability message. These blogs encourage sharing of experiences around sustainability and also have information on the latest trends in sustainable fashion. South African fashion bloggers have also started sustainable fashion blogs. The small-scale producer sector continues to engage with customers on key social media platforms with their sites attracting high numbers of followers possibly following the lead of the larger fashion producers and emulating the very evident focus on social media marketing during the pandemic. The pandemic has revolutionised the role of social media in the marketing mix driven by the move to digital channels and increased use of social media for recreation, commerce, escapism, and information gathering. This trend is likely to continue as the pandemic remains a threat and even with vaccine rollouts presenting some hope and as economies return to normal business operations at different rates in different regions with faster rates in the global north. Social media has also played a pivotal role in promoting vaccination and encouraging the use of masks and other behaviours that help reduce the spread of COVID- 19.

7.5 C0VID- 19 – Implications for small scale fashion producers and their transition to sustainability

COVID- 19 has had an impact on the global and South African fashion industry and has specific implications for sustainable fashion and the transition to sustainability. Small scale producers in South Africa have had to adapt their businesses to the pandemic showing resilience and innovation as outlined earlier regarding the designers who reported on their experiences in the pandemic age. Focusing on planning and trying to reduce costs while switching to online platforms are some of the ways that this sector is adapting. As the pandemic continues to evolve and some of the restrictions are lifted, the operating environment has allowed some return to normalcy, but ongoing customer demand has changed with the slowdown in events, the reduced need for formal clothing and fears regarding the pandemic still representing a barrier to consumers.

Sustainability while a growing influence before the pandemic may come under increasing scrutiny in the pandemic age. Economic, social, and environmental sustainability have all been threatened by the pandemic. The importance of economic sustainability emerged in the surveys and interviews with designers and economic viability is even more of a concern for all businesses during the pandemic. Some designers expressed that while a switch to eco-friendly processes was something they had considered it was not viable due to the costs involved. The weaknesses of the fast fashion industry have been revealed by the pandemic and it has been noted that this may lead to a move to more sustainable practices in the industry as customers opt for slow fashion garments that are more durable and have less impact on the environment. The COVID- 19 pandemic has reduced demand for clothing significantly leaving retailers with weeks of unsold clothes and has created a situation where there is an inventory build-up, and this highlights the shortcomings of the fast fashion industry (Rush, 2020). This has resulted in a cash flow problem within the industry. The cancellation of events and scheduled calendars of the fashion industry reflect an industry that has had to adjust to a significantly changed environment in the ongoing COVID- 19 era with all players including small scale producers being adversely impacted.

On a positive note, there are some positive developments from a renewed innovative focus in the COVID- 19 era as designers and all levels of the supply chain grapple with how they can keep operating in a difficult and uncertain environment (Velasquez, 2020) and this was also apparent in South Africa. Small scale producers have shifted to online platforms and incorporated innovative ways to reduce waste, adapt to the pandemic and continue to operate. Social media platforms like Instagram, Facebook and Tik Tok have seen exponential growth in the pandemic age.

The impacts of the virus on the fashion industry has highlighted the crisis of social responsibility in the industry and highlighted the need for policies that protect producer countries such as Bangladesh which have been left out in the cold (Barboni Halik, 2020) Mass cancellations of orders remain pervasive and the realisation that there are few policies in place to protect these suppliers indicates the need for the industry to introspect and create a more favourable policy environment for the most vulnerable in the supply chain. Prior to the pandemic, online shopping was growing in significance in the fashion industry. In the pandemic era, online shopping is being promoted by retailers in a time when consumers are grappling with declining disposable income and very real financial pressures (Quereshi, 2020). Social issues emerged as key considerations for small scale designers with some designers indicating that they choose to support local artisans and are concerned about uplifting the communities in which they operate.

The 2020 McKinsey state of the fashion industry report highlights some of the trends which had been expected for the fashion industry in 2020. The advent of the pandemic shifted these forecasts and in an industry already facing challenges

- The report was compiled before the coronavirus hit all regions but had predicted a downturn in sales buoyancy and a poor outlook for the industry in 2020.
- The global growth rate was estimated at 3 to 4% for 2020 which was a reduction in the growth estimate for 2019.
- Consumer demand was expected to slow down due to difficult macroeconomic conditions, political instability in some regions and trade wars.
- North America expected to have slow growth.
- Asia Pacific markets predicted to remain strong but slow growth forecast.
- Mature European countries Europe continuing to face challenges.
- Emerging Europe, Latin America, middle east, and Africa doing relatively well.
- Brazil and Nigeria to be brighter regions.

The advent of the coronavirus has added further strain to a fashion industry already grappling with viability challenges. The review of impacts and trends in different regions in the COVID- 19 era also highlights real issues in the industry and very real social justice issues that have been highlighted during this period. Layoffs and other ways to protect the industry will have to be instituted as it is possible that many industries will not survive the ongoing issues of market access and viability that have risen. As lockdown restrictions continue, shopping for clothing has taken on a different role

The South African and African fashion industry has not been left unscathed during this time and new reports also indicate an industry in distress. A Vogue Business article (Owoh, 2020) highlights how the pandemic has halted production and forced stores to close, prompting African fashion designers to build up their businesses online. The COVID-19 pandemic has led to a flurry of activity aimed at setting up online businesses to make up for sales closure. The pandemic has highlighted the need to have a strong digital presence and that the African fashion industry needs to move in that direction. A recently launched African fashion industry platform, *Fashionomics*, has been hosting webinars to promote the industry and has been pushing for the digitisation of the African fashion industry.

The disruptions of the lockdowns have left many designers unprepared for the effects on their business. Fashion Week events and other events of the fashion industry have been disrupted by the pandemic. Runways are not currently possible, and this has impacted how designers showcase their wares and left them only with digital options.

The coronavirus pandemic has highlighted the urgent need to build more resilient value chains as evidenced by the way the pandemic has hit hard fashion businesses (African Development Bank, 2020). There will be a need to rebuild the industry in the post COVID-19 era. Digital strategies will play a role, but other strategies will also be needed. The workers at the lowest level have been hardest hit and felt the brunt of the pandemic. No fashion business in any country has been left untouched by the virus and the impacts of the virus may be worse in other regions, but generally all regions face an uphill road to recovery.

The COVID- 19 pandemic will pass but what is clear is that the fashion industry will not remain unscathed after the virus period has ended. The impacts already observable indicate an industry in distress. The organisation and skewing of the industry towards the east where the virus began has heightened the fragility of the industry and the supply chains inherent weakness. The loss of jobs and the loss of revenue will have far reaching effects. Different regions have indicated a jolt to the fashion industry likely to take a long time to recover. Some regions like New Zealand have welcomed the boost to local industries as global source markets are inaccessible. The rise of sustainability in South Africa has also been seen in the strategies of large retail chains. Some have a very visible sustainability focus and issues around waste management and recycling have been promoted to consumers. While many of the initiatives may have a marketing and brand promotion focus there may also be rooted in the requirements of companies to have sustainability reporting in their annual reports. The initiatives aimed at reducing the impact of different fabrics on the environment like the Better Cotton Initiative have been a welcome change. The rise of sustainability had been a visible and growing trend in the fashion industry pre COVID-19 pandemic, and it will be interesting to note the role that sustainability initiatives will play in the post virus era and during a time when businesses must make significant changes to their model of operation and rebuild better. There are very definite negative impacts on the fashion industry as a result of the pandemic. The virus caught the fashion industry by surprise but in some ways it has been positive bringing opportunities for innovation, especially in the African fashion industry which is lagging behind in its digital innovation and use of technology.

What the COVID- 19 pandemic has shown is the rising influence of the fashion industry as well as its fragilities. What will happen as the virus ends will depend on the state that the industry will be at that point. There are many worthy platforms and organisations that are working to safeguard the industry across the globe and in South Africa in the COVID-19 era. There is need for resilience during this COVID- 19 era and for crafting a speedy path to recovery after the virus. Online platforms have been particularly beneficial during this lockdown season and as many retail shops open and restrictions are eased a new vision for the fashion industry will have to be crafted. . It had to take a global pandemic to focus the eyes of the world on the injustices in the global fashion value chain and the weaknesses of the supply chain of the fashion industry.

The need for fashion businesses to be really in touch with their customer will be paramount in the COVID- 19 era and beyond and as businesses look for the best model of operation in a vastly changed world scrambling for economic recovery. There is definitely a grim outlook predicted after the virus but there is also a silver lining as businesses can choose to respond to the crisis in ways that build the industry and protect every component of the value chain. An opportunity exists, as has been noted, to completely overhaul how the industry operates creating a more sustainable future. Will the fashion industry be able to pick out the opportunities or will there be continuous floundering as the world waits with bated breath to see a pandemic that has shaken the world decisively end?

Sustainability initiatives in the fashion industry must move beyond a mere buzzword that aids marketing but to a way of operation and value chains must be designed that reflect a clear sustainability focus. This has to be the future as fashion businesses struggle to get back on their feet in a world where the consumer has also shifted their purchasing priorities and behaviour. Chapter 5 looked at how consumers make purchasing decisions and interrogated whether the consumer is ready to switch to eco-friendly fashion options. In Chapter 4 designer sentiments on the rise of eco fashion and sustainability were interrogated. Other regions may have been more prepared than many African fashion designers to a move to online platforms and the digitalization of the value chain, but this presents opportunities for innovation. Will sustainability be a priority in a post COVID-19 world? There is need for ongoing research into how the fashion industry will be impacted by the COVID- 19 pandemic.

Will fast fashion be replaced by slow fashion? The rise of fast fashion has been a defining characteristic of the fashion industry. Consumers have opted to buy clothing that is cheaper but more trendy yet not durable. Will this change in the era after the virus? Moorhouse (2020) describes how fashion can become more circular as garments go through a lifecycle but are never discarded, from creation to usage and then recycled and this would eliminate the waste issues inherent in the industry. Waste is one of the key environmental impacts of the fashion industry and needs to be addressed. Small scale producers in South Africa are already engaging with innovative ways to reduce waste and showing innovation in waste management. In the era after the coronavirus will there be a concerted effort to address the wastage issues in the industry or will we see a return to the tons of waste generated by the industry yearly. Focusing on the circular economy will help create a restorative culture rather than a scenario where the wastage generated by the industry is significant. The fashion industry needs a plan to repair its reputation regarding the environment. A number of positive developments have been made, yet there is much to be done.

As Moorhouse (2020) describes

> the world is increasingly worried about the environmental and social costs of fashion, particularly items that have a short lifespan. Mass produced fashion is often manufactured where labour is cheap but working conditions can be poor. Sweatshops can be found in countries with stricter regulations.

In the months ahead when lockdown restrictions will be gradually lifted what will the landscape of the fashion industry look like? Will there be significant modifications as has been predicted to consumer purchasing patterns as well as the operations of the fashion industry globally? What is certain is there has been a shaking of the industry. Will there be a new normal or will the industry slide back into its old ways? It is not easy to overhaul a whole industry that has functioned in a particular way for many years, and it will take commitment and a resolve to change. The viability issues after the pandemic may change the focus of the whole industry to survival mode and this will impact the quest for sustainability. The future may be uncertain as the virus situation unfolds but the reality is that the industry has been shaken and will have to find a different way to operate in the years after the virus. While business operations slowly start to open, it must be asked, will we see a new face for the fashion industry built on principles of sustainability and veering away from fast fashion?

The fashion industry has operated on a particular operational model for decades, but the advent of the COVID-19 virus has revealed the weaknesses and inconsistencies in this operating model (Mckinsey, 2021). The question of social justice and the working conditions of garment workers in poor countries has been raised and illustrates the loopholes in the system that need urgent attention. The COVID-19 pandemic will pass but the fashion industry will have been significantly shaken. What will the future of the fashion industry be after the pandemic? The question that lingers is, will sustainability be a priority after the virus and in the same way? Will we see greater transparency in the way large retailers operate? Will there be an indelible change in the hierarchies of the industry that have led to the exploitation and the marginalisation of voiceless garment workers in poor countries? It has to be possible to envision a future that does not associate the fashion industry with environmental degradation and social justice weaknesses.

The COVID- 19 pandemic has led to a vast change in consumer purchasing behaviour in response to their changing work and home arrangements which has impacted the fashion industry and continues to impact the operations of the fashion industry and small-scale producers. Consumer behaviour in relation to South Africa was discussed in Chapter 5 and continues to evolve as the virus lockdowns and variants continue to shift and change but what is certain is that the environment is changing, and fashion businesses of all kinds including small scale producers have to adapt to the new operating environment in the 'new normal' and e-commerce has certainly taken on a more pivotal role.

CHAPTER EIGHT

Sustainability and the Fashion Design Sector in South Africa – A Win or a Miss?

'The greatest threat to our planet is the belief that someone else will save it.'

Robert Swan

8.1 Introduction

Small-scale independent fashion designers are cemented as a key category in South Africa's clothing and textile industry and issues relating to adverse environmental impacts and the safeguarding of the planets resources have become key to global development and pivotal to policy formulation across the globe. In this concluding chapter the focus is on the small-scale sector and how changes in this sector could be a bridge to catalyse a more cogent focus on eco fashion across the whole fashion sector. Suggestions that could help the small-scale sector to focus on sustainability are made.

The nexus of the fashion industry and the environment has raised increasing interest. Sustainability issues relating to the environment have become a visible and integral consideration in the global fashion industry as seen in the growing call to revamp the operations of the industry to adhere to good environmental practices and to safeguard all aspects of the environment. The sustainability debates in the fashion industry have diffused from the developed regions of the world and are garnering attention in Africa and other emerging markets. Against the background of the COVID- 19 pandemic, the move to engage with sustainability issues has been prioritised and even more so as the reality of climate change and other indicators of environmental degradation become more apparent.

There is no doubt that the environmental movement and environmental lobbyists have raised the alarm on anthropogenic environmental impacts and even more loudly recently with the catastrophic impact of the zoonotic disease, COVID- 19. Environmental issues in the fashion industry are no longer a peripheral consideration but are taking a more pivotal role in policy formulation and strategic direction in an industry with a tainted reputation regarding its impact on the environment. The priority nature of the concerns around environmental degradation have been widely documented and widespread opinion indicates an environment facing a real crisis. Environmental indicators such as biodiversity decline, pollution and climate change have highlighted the severity of the environmental issues facing the planet (UN NEWS, 2021) The challenges facing the environment largely due to anthropogenic activities are real. Anthropogenic climate change is a key threat to humanity in the 21st century presenting a conundrum of impacts on humanity and the earth.

The narratives of sustainability have been more marked in the developed regions of the Global North but also reflect a growing focus and interest outside the traditional centres of the fashion industry of Europe and North America. On the African continent, a wave of sustainability interest and promotion is evident, especially in key fashion cities like Lagos and Johannesburg. The South African fashion industry continues to emerge as a sector with a pivotal role to play in the economy and its contribution to employment creation has been hailed. Recent developments in the South African fashion industry reveal an innovative and creative industry and the rise of independent small-scale designers is a definite feature of the industry. The fashion industry has remained resilient in the face of real challenges. The onset of a global pandemic has worsened the environmental crisis, but the industry remains a high potential economic sector in South Africa's economic landscape. The value of the industry in an economy shaken by a global pandemic remains and particularly as regards unemployment. The advent of eco collections and the incorporation of sustainable principles in design by South African designers heralds an era of increasing awareness of environmental issues. The unexpected collision of the COVID- 19 pandemic and the quest for sustainability in the global fashion industry creates a cocktail of uncertainty as regards the sustainability trajectory of the industry. An air of trepidation and uncertainty has rocked the industry as in other sectors of the economy impacted by the pandemic. Small-scale producers already face challenges, so the pandemic has heightened issues of viability in the industry and impacted the transition to sustainability.

The sustainability movement has been vocal in its call to move to a more sustainable fashion industry but the progress towards sustainability in many localities remains excruciatingly slow. Myriad initiatives to raise awareness on sustainability issues in the industry have arisen. The organisation and operations of the fashion industry predisposes it to adverse environmental impacts and the social justice record of the industry has shown serious injustices in the way workers are treated in low-income countries. The rise of fast fashion has added to the unsustainable nature of the industry leading to waste management issues and a fall in the quality and longevity of clothing. The quest for sustainability in the global fashion industry is a global concern with rising calls for accountability in the manufacturing and retailing of fashion garments but the overhauling of an industry that has ingrained ways of operating is a herculean task. The fashion industry has been associated with adverse environmental impacts and small businesses and large organisations have played a role in unsustainable practices.

The environmental impact of the fashion industry is alarming and is without doubt a real malady needing urgent attention. Brewer (2019) identifies key areas of environmental degradation as a result of fashion industry activities. Firstly, fashion is amongst the world's most polluting industries and requires enormous amounts of raw materials, creates considerable levels of pollution, and has a significant carbon footprint and generates large amounts of waste. It is estimated that 20000 litres of water are required to produce one kilogram of cotton. Brewer (2019) also highlights that the law has not been helpful in promoting sustainability in a world that is increasingly obsessed with social and image connectivity. The controversial fast fashion model has changed the fashion industry while generating significant carbon footprints and a multitude of social issues. The large amounts of industrial waste generated by the industry are significant. It is estimated that the industry contributes 17-20% of global industrial water pollution. Industrial water from the textiles industry contains high levels of harmful dyes and other chemicals which may be toxic to marine life and also detrimental to human health. Dyes may also contain carcinogens which have been shown to cause several cancers. The industry also accounts for 10% of carbon emissions. Disposal of unwanted clothing also creates huge amounts of waste.

The adverse impacts of the fashion industry on the environment have been well documented and whether post pandemic this will change remains to be seen. While there are promising indications that the industry will survive the pandemic, there is likely to be a new way of operating after the virus as industries grapple to align themselves and contribute to rebuilding cities and towns which had felt the brunt of the virus.

The findings of this study reveal a fashion industry teetering on the brink exacerbated by the COVID-19 pandemic as the long-term effects of the virus on the operation of the industry remain uncertain. While there is reason for optimism, there are real fears around business viability during the pandemic and possibly afterwards. For years, many fashion industries globally have been battling with the emergence of China and its dominant position in the global value chains of the industry. The aggressive export strategy adopted by China with a penetration pricing strategy has been catastrophic to fashion industries, particularly in emerging and developing markets that have struggled to compete. Cheap Chinese imports have made it difficult for many local fashion industries to compete. The advent of the COVID- 19 pandemic may have shaken this model of the global fashion industry highlighting its weaknesses, but it is likely that after the virus there will still be a skewing of the global fashion industry to the east, unless there is a significant turnaround in the organisation of the industry which may eventually happen.

8.2 Discussion and Implications

Sustainability affects how a business operates and has risen to a key goal for businesses worldwide. Like the rest of the globe, the resounding call for a more sustainable fashion industry continues in South Africa and across Africa as we see initiatives aimed at sustainability emerge in different locales around the continent and beyond. Small fashion design businesses or small-scale fashion producers operating in South Africa face their own unique set of challenges as their size is often a limiting factor to business viability and innovation. Nonetheless they have started to focus on sustainability in myriad ways through the garment construction phases and in innovative ways. The adoption of circular economy principles in the garment construction cycle at key phases is evident with some designers actually focusing on eco-friendly collections. The aim of the study was to engage with how fashion designers in South Africa are engaging with issues of sustainability and it was revealed that issues of environmental sustainability are important to designers to differing extents. The COVID- 19 pandemic has been transformative to the operations of all types of businesses across the globe and in South Africa. Small fashion design businesses in South Africa are engaging with sustainability in a COVID- 19 era and in a recessionary environment and currently grappling with a new more online based approach to selling and marketing their wares which makes it even more difficult to spread the sustainability message. A focus on sustainability seeks to address the environmental impacts of the fashion industry but remains an area of uncertainty in terms of syncing the approaches to sustainability in large and small organisations.

In this chapter, the main findings and themes emerging from the study are presented and critiqued against the backdrop of an uncertain operating environment clouded by an unfolding virus situation. While many countries including South Africa have reduced lockdown restrictions and a lot of business activities have resumed, there is still a long way to economic recovery, and until a cure or an effective vaccine becomes available it will continue to be an environment fraught with uncertainty.

Can sustainable fashion and sustainability really take root in South Africa? Are businesses ready to engage with sustainability and in particular the fashion industry. The fashion industry is a very fragmented industry with a complex organisation and as was mentioned earlier, garments can be designed in one country, made in another country to be sold in another country and various permutations of this (Cimatti et al., 2017). The fast fashion operating model thrives on a very finely tuned assembly line and the time from catwalk to consumer greatly reduced at 6 weeks (Cimatti et al., 2017). Juxtaposed to fast fashion is the slow fashion operating model which results in longer lead times, is less dependent on the styles on the runways but focuses on durability and quality (Bhardwaj & Fairhurst, 2009). The war between these two types of fashion garment making models is indeed the crux of the sustainability challenge. Can fast fashion which is the predominant type of fashion be replaced by slow fashion which safeguards the environment? Can consumers be persuaded to switch to slow fashion and sustainable fashion in an environment of reduced incomes and in the aftermath of the pandemic? How are small fashion design businesses engaging with these two types of fashion models. Slow fashion and fast fashion are diametrically opposite approaches to the fashion industry and while the consumer has tended to gravitate towards the fast fashion model mainly for affordability reasons, the call to move away from fast fashion is getting louder.

The fragile ecosystem balance of the earth is extremely vulnerable to disturbances and as the world fights the COVID-19 pandemic we can all attest to the impacts of ecosystem interferences. The environment continues to bear the brunt of anthropogenic activities and the fashion industry is a key polluter with widespread impacts in diverse localities threatening ecosystems and disturbing environmental stability. It is estimated that a significant percentage of carbon emissions are from the fashion industry. The call to sustainability cannot be more urgent. Sustainable fashion as mentioned by Khandual and Pradhan (2019) takes many different forms and therein lies the difficulty of operating in an industry that is in no way easily organised or where clarity in terminology is not apparent. The difficulty in engaging with sustainability is very often the understanding of the meaning of the term (Henninger, 2016). It has been the focus of many sustainability programs to focus on the supply chain (Shen, 2014). Cervellon and Carey (2011) also highlight the plethora of terms in the green products realm, that lead to confusion. The era of environmental accounting has taken on a very mathematical approach to the calculation of sustainability (Franzese et al., 2019).

Life cycle analysis, an increasingly popular measure of environmental impacts, has shown the adverse impacts of the industry in large retail companies and has become a methodology that is more and more apparent. Large fashion retailers have taken on this approach to sustainability, and this is evident in their annual reports and other reports meant to track the impact of their operations on the environment. While this is commendable sometimes it raises the question of credibility and authenticity.

The fashion industry has become a global multibillion industry with a significant impact on economies worldwide. Across the globe, trendsetting designs with local and international flair have created fashion sectors with memorable cultural content and global acclaim (Boston Consulting Group, 2020). The adverse impacts of the fashion industry on the environment has been a niggling issue that has tainted the reputation of the industry (UNEP, 2019). Within South Africa, since the fall of apartheid, the fashion industry has risen to a very visible industry as designers draw from cultural inspiration and international trends to create mesmerising designs (Rogerson, 2006, SA Fashion Handbook Week,2019). While sustainability has been visible as a goal within the large clothing chains as the need to report on sustainability increases, little has been studied in the way small fashion design businesses have engaged with issues of environmental impact and sustainability (Shen, 2014).

Environmental impacts of the fashion industry and other anthropogenic activities have left the environment in a very vulnerable way. Indicators of environmental destruction such as biodiversity loss have shown the extent of environmental degradation in many localities (UNEP, 2018). It is estimated that a significant percentage of biodiversity has been lost in the last few years. Plastic waste continues to contaminate oceans and other water bodies. Waste management is often a hazardous activity threatening ecosystems and destroying vital flora and fauna. Climate change is evident and has seen global warming and other impacts changing weather patterns all indicating an environment that is increasingly under pressure. The Intergovernmental Panel on Climate change (IPCC) continues to highlight the gravity of the issues facing the planet with regards to climate change (IPCC, 2015). South Africa has several strategies to safeguard the environment targeting the vulnerability of the nation and strategies targeting water shortages are one of them. Various policies such as the Green Economy Accord aim to safeguard the economy.

A global pandemic has changed the way industries operate and the fashion industry has been significantly impacted (Boston Consulting Group, 2020; McIntosh, 2020). A new normal or a return to old ways are the two pathways that can emerge out of an event as lifechanging as the pandemic. What is clear is that any forecasts preCOVID-19 have been erased and the world must navigate a vastly changed world (World Bank,2020) Small fashion design businesses by virtue of their size and focus will have experienced tremors and outright shaking to their model of operation as a result of the virus (Qureshi, 2020). Will the fashion industry reinvent itself after the pandemic?

Sustainability has become somewhat of a buzzword in the fashion industry as it gains popularity. The rise of sustainable fashion globally has become entrenched in the more developed regions but has now become more visible in the less developed regions, including the Global South (Lundblad &Davies, 2015). The rise of the green economy and the growing voice to safeguard the environment has helped raise the profile of sustainable fashion (Todeschini et al., 2017). The need to safeguard the environmental assets of the earth has been repeatedly raised as widespread indicators of environmental destruction continue.

Sustainability while it is a term that is globally known remains somewhat unclear in its meaning and positioning. The Brundtland commission definition of sustainable development has wide acclaim but has not resulted in the meaning being a lot clearer (Redclift, 2005). The 1987 definition of sustainable development is defined as development that meets the needs of this generation without compromising the needs of future generations (Kuhlman & Farrington, 2010). What this means has tended to vary. Within the large retail clothing chains sustainability has taken on an accounting framework with intricate calculations of carbon emissions and other indications of sustainability like water usage even to the very small components of products (Franzese et al., 2019). Small fashion design businesses in their operating framework generally work on a smaller scale and this has been seen in how they have sought to incorporate sustainability initiatives from the design stage to the distribution and retail stage, from pattern cutting to distribution often by courier services, this model of operation requires a different approach to sustainability. The focus of sustainability in large clothing chains which have very widely publicised sustainability programs like H&M has been on the supply chain looking at procurement, waste management, production and to the distribution and selling of their garments although it is questionable what the motive of the very public sustainability initiatives are. H&M in particular has a very public display of their environmental initiatives and are currently airing an advertisement that speaks to their sustainability focus on South African TV channels.

Chapter one brings to the fore the issues facing the fashion industry and its impact on the environment. While the industry is undoubtedly glitzy and showcases the very best in creativity, there is a darker side of the industry. Many researchers have and continue to draw attention to the unsustainable nature of the industry, and the social justice issues plaguing the industry require a fresh approach to the organisation and operation of the industry and it may take a herculean task to revamp the industry from a fast fashion focus to a slow fashion approach (Shen, 2014, Shen, 2016, Caniato et. al., 2012). While designers are keen to adopt sustainability in their businesses and highlighted their concern with environmental factors, this has not definitely been the case with consumers across many localities presenting a bit of a difficulty. Will it be a steep learning curve for consumers to appreciate the sustainability message? The environmental message has been widely disseminated but many people choose to ignore it or do not take it really seriously. The perils of fast fashion need to imprint into consumers mind changing behaviour in a way that will truly impact the environment.

As seen in chapter two, sustainable fashion is aimed at addressing the negative impacts of the fashion industry. The key themes emerging from the fashion industry in chapter two was a picture of a vibrant and innovative fashion sector (Mckinsey, 2016). Since the pre apartheid era and into the post-apartheid era the industry has continued to innovate and there are fashion events such as SA Fashion Week that continue to position the industry as a sector of influence. There are issues relating to viability and some operational challenges that linger in the industry (Gatawa 2008; Rogerson, 2006) but there is now a real push towards more fashion related research. The challenges in the fashion industry relate to the small-scale nature of many fashion design businesses and the shift in consumer shopping behaviour which has left many fashion businesses in distress. The online shopping era has changed the way consumers purchase and there is a call for the digitisation of the industry, especially in Africa. A new web-based platform *Fashionomics* has been created by the African Development Bank to grow and position the African fashion industry for success highlighting the weight or importance ascribed to the African fashion industry by policymakers (African Development Bank, 2019; SA Fashion Week Handbook, 2019). During the pandemic *Fashionomics Africa has* been hosting webinars aimed at growing the fashion industry. The sudden advent of the coronavirus has also upset the organisation of the global fashion industry upsetting buying cycles and reducing in-store traffic and pushing consumers to online purchasing while they observe social distancing rules even as lockdown restrictions are lifted.

The methodology of the study was changed necessitated by the COVID-19 lockdowns and the social distancing rules that reduced face to face contact with customers and respondents. This change greatly reduced access to willing respondents, and I am infinitely grateful to the designers and key informants that agreed to participate in my study at a time when the world was facing a catastrophe and businesses operations teetering on the brink in an uncertain environment. The Johannesburg Fashion district was reduced in its contribution to the study's findings but the district's location in the inner city brings a set of challenges around environmental issues unique to crowded city spaces in Africa. Fashion districts are centres of the fashion industry worldwide and the rise of urban centres of the fashion industry continues to be a focal point for development in the fashion industry in cities worldwide. Clusters of similar businesses serve many functions and perhaps the location of the fashion district will bring light to the environmental sector by allowing the diffusion of environmental practices within the district and can also cascade environmental initiatives. The district is not as busy as had been foreseen but continues to attract mainly Indian and African immigrants as artisan tailors. Many designers have moved out of the district as the negative image of the inner city of the Johannesburg CBD related to crime and safety concerns presents a barrier to potential consumers and even now there is a perception perhaps rooted in some reality that the CBD is not safe.

In chapter five, six case studies/profiles of fashion design businesses in South Africa from Cape Town and Johannesburg are presented and while the sample was small, detailed information was provided regarding environmental practices in each business and revealed that the industry had begun to engage and consider issues of sustainability in a very evident way. The designer profiles revealed that there were real challenges and impediments to the full adoption of eco fashion, both by the customer and the designers. Viability challenges are a concern in the fashion industry and most designers work in a very lean organisational structure and on a small scale. A key barrier to pursuing sustainability in the fashion industry is the availability of environmentally friendly fabrics such as natural and organic fabrics at affordable prices in South Africa. Regarding the consumer in South Africa, the trajectory towards sustainability is slow and the interest levels somewhat muted to a greater extent although there is very definite need for further research to fully unpack South African consumers attitudes to sustainability and sustainable fashion. The designers indicated that their consumers to a larger extent did not place environmental issues at the apex of considerations when purchasing clothing. The issues around poverty and the widening wealth gap in South Africa will definitely affect the lower income consumers ability to purchase sustainable fashion or even engage with sustainable issues. Young consumers and millennials are a key focus area for designers, and they tend to be the ones who set trends in the fashion industry. Their attitudes and perception of fast fashion usually cascade into the rest of the market. If they can be convinced to switch to slow fashion they can play a key role in the moving away from fast fashion and lead to fast fashion avoidance. It may be possible to convince millennial consumers to be first adopters in sustainable fashion and then bringing knowledge and experience of a new fashion product and purchasing behaviour to the rest of the market.

The impact of the COVID- 19 virus outlined in chapter six revealed a global industry in distress and one that will need to be rebuilt post the virus. The organisation of the global fashion industry has also left countries where production takes place vulnerable, raising some key social justice issues (Sachs, 2005). The local industry has also been impacted by the virus and uncertainty definitely exists. Designers interviewed did not express a catastrophic impact on the industry as a result of the pandemic although the effects outlined in the Johannesburg Fashion District may be a microcosm of impacts throughout the country. The ripple effect arising from the disruption of global value chains has cascaded throughout the global industry including the South African Fashion Industry. The social justice record of the fashion industry has been raised repeatedly and continue to be an Achilles heel in the industry.

As highlighted in chapter four, the South African fashion industry has gone through a rather bumpy phase since the end of apartheid and while there are many positive developments there remains serious risks and threats to the operation of the industry. The continued threats of Chinese imports which have disturbed the balance of the industry and operating challenges relating to business viability pose a stumbling block to the industry. In many cases, designers are living from hand to mouth building their businesses but barely able to make a profit. The importance ascribed to sustainability in an environment facing numerous challenges may be reduced.

In chapter five, design businesses and their approach to sustainability are reviewed. What emerges from these cases is that there is definite awareness of sustainability issues by designers and that this is something that they are thinking about but may be constrained in particular ways as mentioned earlier. What is needed is to make it easier for fashion designers to be more sustainable. Is that possible? What would that entail? The question of economic viability is key, and the limitations of size and scale make it difficult. They myriad and varying ways in which designers are approaching sustainability is encouraging and differs from designer to designer. The mismatch is the way consumers do not consider sustainability to be as important to them as to the designers themselves.

In chapter six an exposition of the way consumers make purchase decisions revealed complex interactions in the decision-making processes of consumers (Paramasur & Roberts-Lombard, 2013). The views of consumers and their ability to engage with eco fashion revealed that while there may be interest there was unlikely to be quick adoption at this point. There is however a rising wave of sustainability interest in the global north as my social media investigation revealed. Overall, consumers are still reluctant to adopt eco fashion and this is shown in many ways (Lundbland & Davies, 2015; Henninger, 2016). Returning to the question and focus of the research, sustainability is more and more a consideration for local designers. The real challenges in the industry present a real obstacle to designers launching eco collections or changing their whole business model to focus on eco fashion more significantly. There are myriad challenges that need to be addressed in the global fashion industry and the South African and regional fashion industries especially in this COVID- 19 era. The outlook for the industry after the virus does not look good and it may take a few years for the industry to get back on its feet.

The study adds a voice to the growing call of the industry to be more accountable in its use of resources and to switch to more eco-friendly collections. While the majority of research in the sustainable fashion area has been largely in other more developed regions, the concept of sustainability has reached the Global South. In Africa, from Cape to Cairo, designers are creating collections that speak of a focus on environmental issues and that present a more ethical fashion industry.

There is room for the adoption of sustainability initiatives more definitely across Africa, but this has to be within a context of an industry that has overcome the brutalities of the COVID-19 era and that is now able to craft a way forward minus the real existential crisis that the COVID-19 era presents.

The emergence of eco fashion in South Africa is a promising development but against the background of an unfolding COVID- 19 pandemic is unlikely to take centre stage. The willingness by designers to adopt eco collections is also a welcome development, but as explained in chapter 6, the consumer decision making process is a complex set of interactions influenced by a potpourri of factors, and research in other regions has also indicated a slow uptake of green products. The definitional issues around the green product concept continue to plague the industry. The ability of the eco fashion or sustainable fashion sector to contribute to sustainability exists, but it is at the moment clouded by an industry that will battle to survive post the virus and it is unlikely that sustainability issues will be considered a key priority in a pandemic era although there may also be a more marked interest in environmental issues. The South African fashion industry has been through a bumpy phase since the end of apartheid and while there has been a creative rejuvenation of the fashion industry post-apartheid, like the rest of the creative industries in South Africa issues around access to markets present real viability challenges and impact the operations of the industry in a highly globalised world.

8.3 Emerging insights and their implications for design businesses

There is need for intervention on many fronts to ensure that the fashion industry can operate sustainably after the COVID- 19 pandemic. Governments can play a role by subsidising the industry during and after COVID- 19 as has been seen in other regions, but this has not always been possible. More education aimed at designers and consumers on the value and need to switch to more eco-friendly practices would help change mindsets that have not yet acclimatised to the concept of green innovation and green products. The ability of designers to make eco-friendly garments is often limited by real costs and availability of natural or organic fabrics and this needs to be addressed. The sustainability focus is dependent on the availability of the right fabrics and reduced use of synthetic fabrics and a continued focus on waste management and circular economy practices.

The experience in other regions is that eco fashion is a growing market segment but has not been taken up by consumers to a large extent (Henniger, 2016). What can be done to promote eco fashion and change the mindsets of consumers and designers? The price sensitivity of customers is a real barrier to sustainable fashion adoption and much more promotion and awareness within the consumer market is needed coupled with ensuring that the fashion industry has access to the inputs they need at an affordable price. While eco fashion has gone beyond a fad it remains a niche market that can grow in the right scenario but may take a longer journey to consumer acceptance, especially post the pandemic. This exploratory research into a critical industry in South Africa with a large number of SMEs is vital to economic rejuvenation. While the sample size of this study may have been a limiting factor it did provide insights that are useful, and the review of global and local literature reveal a gnawing lack of insights into sustainable fashion in Africa and into what is a formidable industry in the African context. While the predominant focus of the research was not large retailers, it is shown that large retailers are also grappling with issues of sustainability and some in a very visible way. There is need for further research, especially around consumer uptake of eco fashion in the context of South Africa. What is emerging is that pricing can be a very big barrier to consumer adoption of sustainable fashion and that fast fashion will remain an impediment to progress away from large waste generation type of clothing purchases to more durable slow fashion options. Perhaps after the virus slow fashion will become more popular as values relating to fashion consumption may change and that may lead to consumers switching to eco fashion. The problem with fast fashion is that while it provides instant gratification it requires replacement frequently and is not durable. Fast fashion also places a strain on the environment with the generation of large amounts of waste requiring disposal and often ending up in landfills.

There is also need for further research on a wider scale as this study was limited by sample size and the carrying out of fieldwork during a pandemic. There has not been sufficient research carried out with consumers and this is also an area for further research. The study sought to determine how fashion designers are engaging with the concept of sustainability and revealed an industry grappling with sustainability practices to differing degrees of success. Large clothing chains have a very visible sustainability focus especially companies like H &M (Shen, 2014) but beyond the outward show is there a real difference being made to the environment. Small fashion design businesses are starting to engage with sustainability, but it remains an upward struggle. The myriad challenges in the fashion sector coupled with the advent of the coronavirus era has led to a somewhat shaky road to sustainability. Eco fashion may be taking off in other regions, but it may take a longer and more uphill struggle in South Africa and other less developed regions.

Consumers are still not at the stage where eco fashion is a priority and that needs to be addressed. The organisation of the global fashion industry needs to be revamped. We have seen in this COVID-era that the importance of looking after the environment cannot be taken lightly and that ethical fashion must consider the impact on more than the environment. The social justice issues facing the fashion industry have tainted the reputation of the industry. There is also need to really address the issues of high input costs in relation to garment construction in sustainable fashion. While most designers are keen to launch eco collections and to operate in a more sustainable manner, they face cost pressures and limitations. The fragmented nature of the industry also needs to be addressed requiring a strategy to ensure that the industry speaks with one voice. The innate viability challenges in the industry also need to be tackled as they are a stumbling block to designers wanting to incorporate into their processes sustainable practices.

Once the virus has been successfully contained and the current rollout of vaccines indicates that may be possible in the years ahead there will be a need to rebuild the fashion industry and the fashion industry will require a multi -pronged approach to sustainability. In the large fashion retail sector, sustainability needs to go beyond high-level plans, action plans and boardrooms strategies to really address the issues that have hampered a sustainability focus in the fashion industry.

The profit motive underpinning the goals of many businesses has so often been an impediment to implementing sustainability initiatives. Fast fashion is based on short lead times to the customer from the runway and is affordable to the consumer. It will be hard to convince customers to shift to slow fashion as the trend consciousness and affordability of fast fashion is likely to stand in the way. Small fashion businesses face an uphill struggle as they strive to be sustainable and need attractive incentives and a concerted effort to make operating as a small fashion designer sustainable in South Africa easier. Fashion designers face a plethora of challenges including the lack of marketing skills, financial management skills and the fragmentation of the industry also presents a challenge although there is much that has been done to address these challenges over the years. The consumer at this stage cannot be said to be extremely interested in sustainability but that may change as the message and meaning of sustainability is explained to the consumer in ways and on platforms that are meaningful to them. Sustainable fashion has arrived in South Africa and but still needs to be entrenched in consumers' minds. Fashion design businesses need to market their eco collections more aggressively even as they operate in a restricted and a recessionary environment. **Figure 8.1** illustrates some ways in which sustainable fashion can be positioned to attract more customers in a post COVID-19 era and beyond.

Figure 8.1: Growing the eco fashion segment and increasing uptake by consumers – preliminary pointers

The emergence of eco fashion in South Africa is a welcome development in an industry that is the second largest polluter on earth, yet there are very real challenges to sustainability and the uptake of eco collections.

Consumers have tended to shun slow fashion for a number of reasons, most notably the limiting high prices and the trend consciousness of consumers has favoured fast fashion products focused on the latest trends on the catwalks of the world's fashion capitals. Can slow fashion and sustainable fashion capture the hearts and minds of the consumer? In a post COVID-19 era it is expected that consumers will engage with fashion brands in a different manner, or they may go back to previous ways. As fashion designers and the whole fashion industry at large navigates an uncertain road will we see a change in the way the fashion industry has operated, and will there be a change in the way consumers purchase fashion? There is an increasing body of research around how fashion can become more sustainable. This study seeks to contribute to this research by noting the importance of designers in the quest for sustainability and how the supply chain can be the vehicle through which sustainability can be implemented. Responsible sourcing in particular plays a key role in sustainability and as the structure of the industry remains globally aligned it becomes a key consideration, similarly production efficiencies, astute distribution practices and waste management all play a role in the quest for sustainability.

Fashion designers in South Africa are in a position to really begin to engage fully with issues of sustainability especially the backdrop of the COVID-19 pandemic. It will not be an easy road to sustainable fashion going mainstream in Africa or South Africa but there is reason to hope. The fashion industry can take a history of unsustainability and turn it into a future of sustainability, but it will require a complete overhaul of the way the industry operates. Small fashion businesses can begin to incorporate into their operations at each stage principles that safeguard the environment and prevent the rampant destruction of the environment. There are encouraging signs that this may be possible, but lasting success will require an industry-wide initiative with all players buying in to see the fashion industry change and achieve lasting change.

The consumer has a role to play in safeguarding the environment by opting out of fast fashion purchases to really begin to appreciate the need to switch to slow and sustainable fashion options. These behavioural changes can change the trajectory of the fashion industry globally and in South Africa to a future that safeguards the environment. Sustainability has to be the future of the fashion industry beyond the pandemic and into the decades ahead as we see greater transparency and a more evident push and engagement to sustainability to ensure a better future for the environment.

8.4 Eleven pointers towards a more sustainable designer fashion sector

The greater adoption of sustainable principles in the fashion industry will benefit both the industry and the planet. There is much work that needs to be done to enable a more sustainable fashion industry in South Africa and the following suggestions are possibilities to turn around the fashion industry to a more sustainable pathway. The focus of sustainability interventions is currently largely on the production and marketing processes of the industry that have often been stumbling blocks to environmental conservation. Within a South African context, the pointers below can be helpful in the quest for sustainability in the fashion industry. While some of the pointers would be easy to implement some of them would take a while and would be most beneficial to the industry. Policy interventions from government may aid the implementation of some of these policies while some would need industry bodies like Gauteng Fashion Council and the Cape Town Fashion Council.

Table 8.1 : Twelve pointers towards a more sustainable fashion industry in South Africa

1. Sync customer definition to designer definition of sustainability by expressing more clearly on the garment how the garment focuses on sustainability.

2. Appreciate that the values relating to sustainability of the designer will not always match the consumer.
3. A focus on more industry events that speak to the importance of sustainability
4. Encourage designers to launch more eco-friendly collections by providing subsidies as one of the reasons designers do not launch eco fashion garments is the cost of doing so.
5. Emulate best practices of sustainability from companies which have been successful in this domain.
6. An increased focus on circularity and circular economy principles in garment construction,
7. More research is needed to understand the nuances of sustainability in the fashion industry focusing on small fashion houses and fashion designers.
8. Environmental education needs to be more widespread to raise awareness of the importance of choosing slow fashion options versus fast fashion options for consumers.
9. Poverty needs to be addressed as the high price of sustainable fashion makes it out of the reach of many consumers.
10. Affordable options for slow or sustainable fashion need to be created.
11. Price and lack of sufficient consumer interest are two major impediments to growth of sustainable fashion. Consumers tend to buy fast fashion mainly as a result of the affordability aspect so pricing of slow or sustainable fashion needs to be addressed and the benefits of sustainable fashion really articulated to consumers.
12. Greenwashing should be policed in the fashion industry as it can become a practice by those seeking to dupe customers into buying their clothing on the basis that they were sustainably made.

8.5 Concluding Remarks

Eco fashion has arrived in South Africa yet there are very real impediments to sustainability and the acceptance and uptake of what is a new approach to the fashion industry, against the backdrop of a designer fashion sector that has become increasingly visible and vibrant. The advent of the torrid COVID- 19 pandemic has brought many industries to their knees, including the fashion industry. Globally, the unexpected COVID- 19 pandemic has sent shock waves across many industries crippling many and leaving industries on the brink of bankruptcy or wiped-out businesses unable to adapt to the 'new normal' yet as 2022 begins there is now hope of a return to prepandemic life but still with a lurking virus that has been somewhat contained by a successful vaccine rollout in most parts of the world. Sustainability may shift more to economic sustainability in the wake of rebuilding economies post pandemic.

The designer fashion sector/small scale independent fashion sector in South Africa has been characterised by visible creativity, a bold design vision and an approach that taps into local cultural trends with a very forward driven approach with global ambitions. The designer fashion sector has been characterised by the very visible influx of young, bold, and ambitious designers unafraid to experiment with their design ethos and eager to make a mark in the sector, enthusiastically exploring their own unique creativity and boldly crossing traditional design parameters in the quest for innovation. Inspiration for creative design in South Africa within the fashion industry is drawn widely and very often modelled on global trends. An avant-garde and ambitious exploration of creativity underpinned by cultural heritage is evident.

Sustainability is a growing influence in the global fashion industry. Key influential fashion organisations and events have brought the sustainability trend to the fore of designers in South Africa. On the global stage leading fashion influencers such as Anna Wintour, influential editor of Vogue Magazine and the iconic late Leon Talley of Vogue and locally Lucilla Booysen of SA Fashion Week and Dr. Precious Moloi-Motsepe of African Fashion International have also added their voices to the sustainability discussions. There are real sustainability issues plaguing the global and South African fashion industry and particularly in a COVID- 19 era. Economic sustainability is a key concern and fast fashion is a threat to greater sustainability in the South African fashion industry. Fashion designers in South Africa are interested in and engaging with sustainability but consumers are less bullish. The complexities presented by the COVID- 19 pandemic are a setback to the global fashion industry threatening viability. When the virus period ends, it is hoped that there will be a role for sustainability in the industry but at the moment the sustainability initiatives are spearheaded by the designer with the consumer not as interested. Future research should be conducted that allows the in-depth exploration of sustainability trends in the industry in light of the effects of the pandemic and that explores the role that fashion could play in the creative economy. The fashion industry in South Africa as part of the creative economy remains somewhat hidden or muted and has not yet had a dedicated, formalised, and visible strategy that has guided the industry. Platforms like Fashionomics launched by the African Development Bank to revive and digitise the African fashion sector are welcome as well as disparate developments, organisations and designers engaging in their own sustainability activities in South Africa . There is need for a more cohesive fashion sector that is more holistically aligned and engaged, and that can continue to impact economic activities and create employment in South Africa in a visible way. There is a tendency to view fashion as a somewhat 'playful' industry and a more visible approach to strategy formulation and strategic planning is needed to encourage raising the profile of importance of the industry. Nonetheless, there are many innovative developments in the industry in South Africa and myriad organisations engaged in promoting the industry. In the last decade, there is clearly evident growth and creative exploration by the fashion design sector, but this must also translate into revenue and viability which remains a threat. There is need for ongoing and enhanced engagement with the very real challenges facing the fashion industry in South Africa particularly the challenges facing the SME sector. There is also need to really engage with the challenges around cheap imports in South Africa and the dominance of China. The small-scale producer segment in South Africa's clothing sector can truly be considered an integral part of the South African creative economy and put the industry on a path to sustainable development but sustainability must be entrenched as a crucial consideration in the sector. Finally, there is need for a collaborative global approach to address the triple planetary crisis of 'climate change, declining biodiversity and pollution' facing the planet arising from anthropogenic activities including the activities of the fashion industry and the Global South including South Africa has a role to play in the fight (UN NEWS, 2021). I would also like to assert that eco fashion remains a term that could be interpreted quite differently and may to some mean fashion that protects against the environment in some of the harsh regions of the world where climatic conditions necessitate clothing that keeps out extreme cold, protects against storms and other natural disasters.

CELEBRATING CREATIVITY AND INNOVATION IN FASHION DESIGN

Source: instgram.com, @palesamokubung

Fashion's form may have changed over the years and in different eras, but it still celebrates heritage and valiantly pushes forward traditional design parameters bringing a distinctly contemporary edge to modern fashion design across all regions of the globe.

Source: designindaba.com

Source: luxiders.com

The fashion runways of the world reflect the continued creativity and dynamism in the fashion industry even in a pandemic age and with a creative flair that shines through always. Fashion Week events have become intrepid symbols of fashion’s continued influence showcasing trends and trajectories in diverse cities of the world.

Source: designindaba.com

Menswear has crossed boundaries of form, design and style introducing often unexpected apparel crisscrossing modernity and tradition as the metrosexual man emerges with distinctive fashion preferences and a suave air bringing a resolutely sophisticated man to the streets of the world's cities.

Source: cnbc.com

Source: vogue.co.uk

The fashion designer is such a pivotal player in a globalised fashion industry showcasing collections that yearly and seasonally seek to break new ground in design artistry, trend ethos and creative inspiration. Bold and brave approaches to design symbolise an industry on the move pushing the boundaries of creativity continuously.

Source: nairobifashionhub.co.ke

Source: elle.com

Africa is a land of striking cultural assortment with diverse ethnicities and in fashion design culture is often celebrated in a furious explosion of colour, creativity, and character.

Source: tdsblog.com

The high-end designer fashion brands from Gucci to Louis Vuitton and Burberry are often indicators of wealth and societal status in some circles. We have seen the emergence and continued influence of high-end fashion brands with iconic status that have transcended regions garnering ardent followers even in Africa and symbolising wealth, influence, and often outright snobbery.

Source: eu.louisvuitton.com

Source: luxity.co.za

Green design has arrived on the world's fashion stage, and a wave of sustainability interest is definitely evident. Can fashion be more than form and function to safeguard the environment and impact communities? Eco fashion seeks to address the negativity associated with fashion's impact on the environment.

Source: entrepreneur.com

Source: vogue.in

Source: San Antonio Express News

Fashion speaks a language of defiant innovation and boldly enthuses heritage but the impacts of western influences especially in the millennial generation is unquestionable. Youth and fashion are often a match made in design heaven.

Source:buzzfeed.com

Embracing the uncertainties and incongruencies of the pandemic age is often a mammoth task. A 'new normal' has arrived with masks becoming a normalised fashion accessory in a pandemic age. Is this age here to stay?

Source: thesouthafrican.com

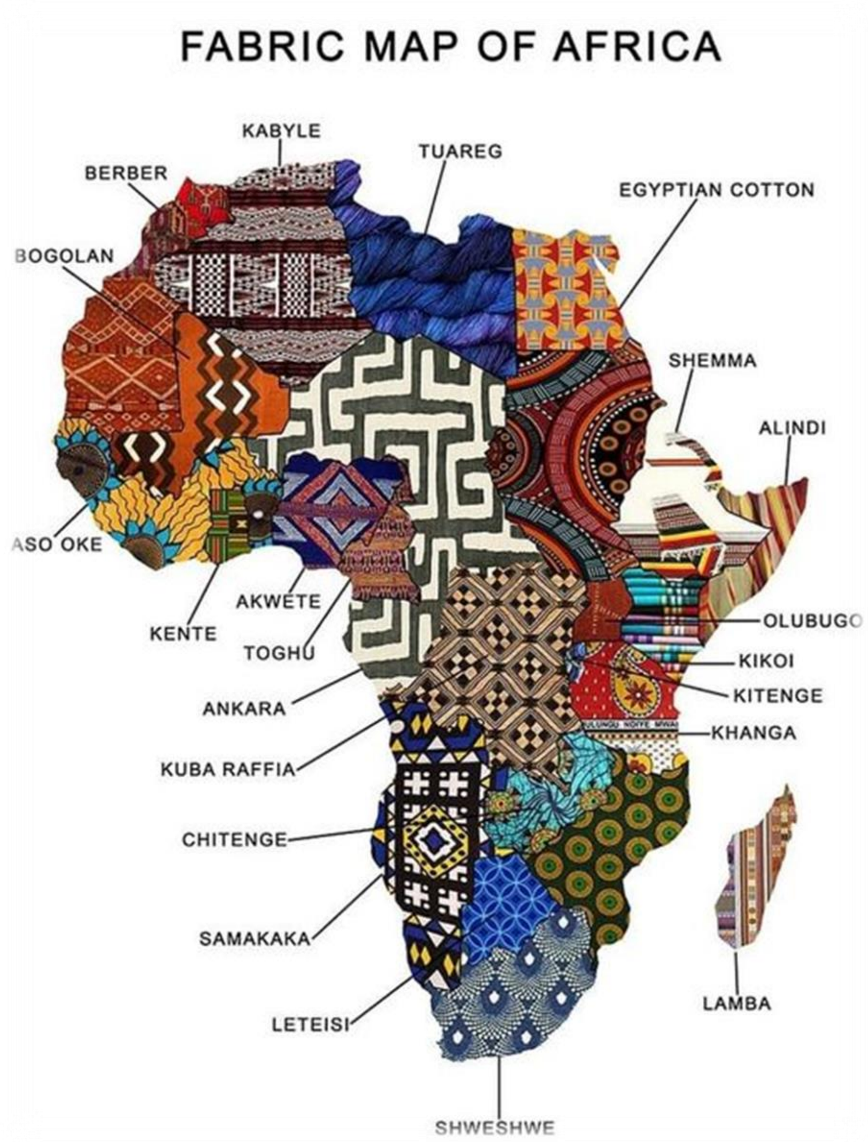
Source: nytimes.com

China's influence on the global fashion industry has been one of the defining changes to the organisation of the industry. Cheap fashion (fast fashion) from China has found its murky way to many countries. While fast fashion has been undeniably detrimental to the industry it has provided affordable options for the poor and enabled the ubiquity of global fashion trends.

Source: vogue.com

Source: en.people.com

Africa is a magnificent melting pot of creative design and within the textile industry we have seen innovation and design boldness in fabric design drawing upon culture and intermixed with modernity from Cape to Cairo.



Source: Gauteng Fashion Council

African fashion continues to play a key role in the global fashion industry and is increasingly recognised as a pivotal component of the global fashion industry sparking new directions in the industry and positioning Africa as a creative continent.

Source: theguardian.com

The Johannesburg fashion district located in the inner city of the Johannesburg CBD has been earmarked as the hub of the fashion industry in Johannesburg and is a striking unexpected explosion of colour in an area traditionally associated with garment production.

Source: showme.co.za

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Source: jda.org.za

The bold styles on the runways of the world’s fashion cities seek to bring a new edge to the fashion industry in every collection

Source: glamour.com

Celebrity influence on fashion design often brings unusual design options that continue to redefine the fashion industry and testing the boundaries of societal norms and always seeking to bring the unexpected to the forefront. Celebrities have influenced fashion design and are often brand ambassadors promoting designer brands.

Source : hellomagazine.com

Source: middle-in-east.com

The rise of new centres of the fashion industry away from the traditional capitals has infused new cultural orientations to the fashion industry in a globalised world.

Source:latinamericanpost.com

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www.nairobifashion.co.ke

Beautiful spaces and iconic architecture set a fitting stage for the fashion industry and create the perfect backdrop for vibrant artistry creating retail spaces that have attracted designer fashion retail outlets infusing creativity into neighbourhoods quite distinctly. The Rosebank Mall houses fashion designers symbiotically interacting with the innate cultural air of one of Johannesburg’s most popular entertainment, office, and retail spaces. Hyde Park, Johannesburg has also emerged as a high-end fashion precinct with a very distinct upper income customer profile and the home of leading global fashion brands.

Source: Joburg.co.za

Source: joburg.co.za

Source: 947.co.za

The distinctive stature of royalty often presents fashion's forward-thinking innovation in fashion choices at key events, ceremonies, and public appearances.

Source: brides.com

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Sustainable fashion design has emerged as a concept in fashion design focus more evidently in recent years. The question of fashion's impact on the environment has become more concerning

Source: unep.org

Source: en.unesco.org

Sports stars like Naomi Osaka and fashion make eager companions with sports stars setting new trends in fashion design and bringing to the world stage a fashion focus that drives sales and creates excitement in the global fashion industry.

Source: instyle.com

Urban regeneration projects infuse culture and character to regions and areas seeking economic or social revival. The Maboneng precinct in Johannesburg seeks to bring an artistic flair to the city and the Johannesburg Fashion District brings fashion creativity to the inner city.

Source: afktravel.com

Source: showme.co.za

The beauty of nature and exotic locations is often a perfect background for luxury fashion shoots celebrating fashion and beautiful destinations. The fashion industry and tourism are a great alliance to build destination brands while promoting fashion across the globe.

Source: nairobifashionhub.co.ke

The beauty and fashion industry are closely linked and as sustainability takes centre stage across the globe we have seen the emergence of sustainable fashion as well as sustainable beauty products also known as eco cosmetics.

Source : fashiongonerogue.com

Eclectic design has brought a quirky edge to the fashion industry showcasing individual design inspiration in an often-unusual way that certainly demands attention.

Source: Instagram.com, @afrrobougee

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SOCIAL MEDIA PAGES

VOGUE BRITAIN INSTAGRAM PAGE – ACCESSED 6 JUNE 2020

VOGUE AUSTRALIA INSTAGRAM PAGE – ACCESSED 6 JUNE 2020

GLAMOUR MAGAZINE UK FACEBOOK PAGE – ACCESSED 8 JUNE 2020

BRITISH VOGUE FACEBOOK PAGE - ACCESSED 5 JUNE 2020

COSMOPOLIATAN SA – ACCESSED – 18 AUGUST 2020

COSMOPOLITAN UK – ACCESSED – 19 AUGUST 2020

GRAZIER SA – ACCESSED – 19 AUGUST 2020

GRAZIER UK – ACCESSED – 19 AUGUST 2020

SUSTAINABLE FASHION PAGES ON INSTAGRAM AND FACEBOOK IN SA AND OTHER REGIONS

TIK TOK VIDEOS FOCUSING ON SUSTAINABLE FASHION

APPENDIX A – ETHICS CLEARANCE FORM

UNIVERSITY OF THE WITWATERSRAND, JOHANNESBURG

Research Office

HUMAN RESEARCH ETHICS COMMITTEE (NON-MEDICAL)
R14/49 Gatawa

CLEARANCE CERTIFICATE	**PROTOCOL NUMBER: H19/04/08**
PROJECT TITLE	The emergence of Eco fashion in South Africa: Fleeting fad or environmental conservation breakthrough?
INVESTIGATOR(S)	Ms N Gatawa
SCHOOL/DEPARTMENT	Geography, Archaeology and Environmental Studies/
DATE CONSIDERED	26 April 2019
DECISION OF THE COMMITTEE	Approved
EXPIRY DATE	24 June 2020

DATE 25 June 2019 **CHAIRPERSON** ______________ (Professor J Knight)

cc: Supervisor : Prof M Simatele

DECLARATION OF INVESTIGATOR(S)

To be completed in duplicate and **ONE COPY** returned to the Secretary at Room 10004, 10th Floor, Senate House, University. Unreported changes to the application may invalidate the clearance given by the HREC (Non-Medical)

I/We fully understand the conditions under which I am/we are authorized to carry out the abovementioned research and I/we guarantee to ensure compliance with these conditions. Should any departure to be contemplated from the research procedure as approved I/we undertake to resubmit the protocol to the Committee. **I agree to completion of a yearly progress report.**

______________________ Signature

_____/_____/_____ Date

PLEASE QUOTE THE PROTOCOL NUMBER ON ALL ENQUIRIES

APPENDIX B – EMAIL SURVEY

School of Geography, Archaeology and Environmental Studies

Private Bag 3, Wits 2050, South Africa Enquiries: GEOGRAPHY: TEL: +27 11 717-6503 • Fax: +27 11 403-7281
ARCHAEOLOGY: TEL: +27 11 717-6045 • Fax: +27 11 339-1620
http://www.wits.ac.za/geography/

UNIVERSITY OF THE WITWATERSRAND JOHANNESBURG

EMAIL SURVEY

ENVIRONMENTAL SUSTAINABILITY IN THE SOUTH AFRICAN FASHION INDUSTRY

DATE: **CITY:**

1. How long have you been a Fashion Designer in South Africa?

Less than 5 years [ ] **5 -10 years** [ ] **Over 10 years** [ ]

2. What market sector do you target?

3. How important are environmental considerations in your own production process?

- Very important
- Moderately important
- Unimportant

4. How important do you think environmental considerations are to your customers?

- Very important
- Moderately important
- Unimportant

5. Are you aware of any dyes and harmful chemicals in the production and transport of the fabrics that you use?

6. What modes of transport do you use in your business to transport your products (if applicable) to customers and to obtain raw materials?

7. How do you dispose of waste from the production process such as scraps of fabrics, threads or any other type of waste generated during the production process and do you recycle your garments and if so in what way?

8. Would you consider launching an ecologically friendly or environmentally friendly fashion brand?

9. Is there anything else you would like to say regarding environmental sustainability in the fashion industry?

APPENDIX C – PARTICIPANT CONSENT FORM (EMAIL SURVEY)

School of Geography, Archaeology and Environmental Studies

Private Bag 3, Wits 2050, South Africa Enquiries: **GEOGRAPHY:** TEL: +27 11 717-6503 • Fax: +27 11 403-7281
ARCHAEOLOGY: TEL: +27 11 717-6045 • Fax: +27 11 339-1620
http://www.wits.ac.za/geography/

UNIVERSITY OF THE WITWATERSRAND JOHANNESBURG

PARTICIPANT CONSENT FORM

Title of Project: The emergence of Eco Fashion in South Africa: Fleeting Fad or Environmental Conservation Breakthrough?

Researcher : Nyasha Grace Gatawa

I ---agree to participate in this research project and understand what the implications of the study will be.

YES NO

I agree that the information I provide will be used for academic research purposes.

YES

NO

I agree that the research has been fully explained to me and I understand what my participation will involve.

YES NO

I agree that my participation is completely voluntary and anonymous, and I will not be specifically identified as a respondent in the study

YES NO

I agree that I will not benefit directly by participating in the study. YES NO

I agree that the findings of the study will be used to compile a research report and may be used in a conference or academic paper.

YES NO

I agree that I may contact any of the people involved in the study to seek further clarification and information.

YES NO

………………………………………………………………………………… Signature

…………………………………………………………………………………Name of Participant

………………………………………………………………………………… Dat

APPENDIX D: PARTICIPANT INFORMATION SHEET (EMAIL SURVEY)

School of Geography, Archaeology and Environmental Studies

Private Bag 3, Wits 2050, South Africa Enquiries: **GEOGRAPHY:** TEL: +27 11 717-6503 • Fax: +27 11 403-7281
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UNIVERSITY OF THE WITWATERSRAND JOHANNESBURG

Research Study: The emergence of Eco Fashion in South Africa: Fleeting Fad or Environmental Conservation Breakthrough?

PARTICIPANT INFORMATION SHEET FOR EMAIL SURVEY PARTICIPANTS

Dear Sir/Madam

My name is Nyasha Grace Gatawa and I am a PhD student in Geography at the University of the Witwatersrand carrying out research into environmental practices and the importance of environmental factors in the Fashion Industry in Johannesburg. The study is only for academic research purposes. I would like to invite you to take part in this email survey. You have been selected to participate in this survey because you are involved in the fashion industry in South Africa. The email survey will take approximately 20 minutes to complete and can be returned to me via email on the email address, 0311578v@students.wits.ac.za

Your participation is entirely voluntary and refusing to participate will not prejudice you or your business in any way. There will be no remuneration for the study and your generosity in assisting with this research study is appreciated. Your responses will be confidential, and I will not in any way use the name of your business and your responses to identify you in the research findings and the research report. Your responses will be stored in a safety deposit box with a key or password. If you have any concerns or complaints regarding the ethical procedures of this study or need any further clarification, you are welcome to contact the University Human Research Ethics Committee (Non-Medical), telephone +27(0) 11 717 1408, email Shaun.Schoeman@wits.ac.za .

Yours sincerely

Nyasha Grace Gatawa, 0311578v@students.wits.ac.za, 0648265161

Dr. Alexander Wafer, alex.wafer@wits.ac.za, 0117176517

APPENDIX E: PARTICIPANT CONSENT FORM (KEY INFORMANTS)

School of Geography, Archaeology and Environmental Studies

Private Bag 3, Wits 2050, South Africa Enquiries: **GEOGRAPHY:** TEL: +27 11 717-6503 • Fax: +27 11 403-7281
ARCHAEOLOGY: TEL: +27 11 717-6045 • Fax: +27 11 339-1620
http://www.wits.ac.za/geography/

UNIVERSITY OF THE WITWATERSRAND JOHANNESBURG

PARTICIPANT CONSENT FORM - KEY INFORMANTS

Title of Project: The emergence of Eco Fashion in South Africa: Fleeting Fad or Environmental Conservation Breakthrough?

Researcher : Nyasha Grace Gatawa

I --agree to participate in this research project and understand what the implications of the study will be.

I agree that the information I provide will be used for academic research purposes. YES NO

I agree that my participation is completely voluntary and anonymous.

YES NO

I agree that the researcher may use anonymous quotes in her research report.

YES NO

I agree to my interview being audio-recorded.

YES NO

I agree that the researcher can take notes during the interview

YES NO

I agree that I will not benefit directly by participating in this study.

YES NO

I agree that the information I provide will be used in a final research report. YES

NO

……………………………………………………………………………… Signature

………………………………………………………………………………Name of Participant

……………………………………………………………………………….Date

APPENDIX F : INTERVIEW GUIDE FOR KEY INFORMANTS

School of Geography, Archaeology and Environmental Studies

Private Bag 3, Wits 2050, South Africa
Enquiries: GEOGRAPHY: TEL: +27 11 717-6503 • Fax: +27 11 403-7281
ARCHAEOLOGY: TEL: +27 11 717-6045 • Fax: +27 11 339-1620
http://www.wits.ac.za/geography/

UNIVERSITY OF THE WITWATERSRAND JOHANNESBURG

INTERVIEW GUIDE FOR KEY INFORMANTS IN THE JOHANNESBURG FASHION INDUSTRY.

My name is Nyasha Grace Gatawa and I am a PhD student in Geography at the University of the Witwatersrand carrying out research and would like to find out your views regarding the relationship between environmental practices and the fashion industry and how environmental factors impact the operations of the industry.

Please note that your participation in this research is voluntary.

Date **Time**

Key Informant Details:

1. **Fashion Industry in South Africa and Johannesburg**

In your opinion, what are the key trends in the fashion industry in South Africa and specifically in Johannesburg?

2. **Environmental practices in the Fashion Industry in Johannesburg**

2.1 I would like to chat to you briefly about environmental practices in the fashion industry. Please kindly share with me some of your views on how the fashion industry is incorporating environmental factors?

2.2 Are there specific practices that you think should be employed to protect the environment and contribute to environmental conservation in the fashion industry?

3. **Raw Material Sourcing and Resource Management**

There has been quite a bit of focus on the importance of procurement and raw material sourcing in environmental protection across many industries. Please share with me some of your views on the importance of procurement in how the fashion industry is relating to the environment?

4. **Production Practices and the use of chemicals and dyes**

What are some things you have noted regarding production practices in the fashion industry and their impact on the environment?

5. **Distribution Logistics**

Are you in a position to share with me your views on transport and distribution factors and their impact on the environment specifically relating to the fashion industry?

6. **Waste Disposal**

Waste Management is increasingly topical in discussions relating to the environment. How is the fashion industry grappling with waste management and recycling?

7. **Water Utilisation and the Environment**

7.1 Please kindly share your views on how the fashion industry has dealt with water issues and the environmental challenges around water shortages affecting all industries globally?

8. **Fashion Industry and the Environment: Opportunities, Threats**

8.1 In your opinion, what challenges exist in implementing environmentally friendly practices in the fashion industry?

8.2 In your opinion, what opportunities exist to incorporate environmentally friendly practices in the fashion industry in South Africa?

8.3 Based on our discussion, do you have any other comments regarding environmentally friendly practices in the fashion industry?

THANK YOU FOR YOUR TIME

APPENDIX G : PARTICIPATION INFORMANT SHEET – KEY INFORMANTS

School of Geography, Archaeology and Environmental Studies

Private Bag 3, Wits 2050, South Africa Enquiries: **GEOGRAPHY:** TEL: +27 11 717-6503 • Fax: +27 11 403-7281
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UNIVERSITY OF THE WITWATERSRAND JOHANNESBURG

PhD Research Study: The emergence of Eco Fashion in South Africa: Fleeting Fad or Environmental Conservation Breakthrough?

PARTICIPANT INFORMATION SHEET **– KEY INFORMANTS**

My name is Nyasha Grace Gatawa and I am a PhD student in Geography at the University of the Witwatersrand carrying out research into the importance of environmental practices or environmental factors in the Fashion Industry in Johannesburg. I am investigating natural resource management, production, distribution, and waste management practices in the fashion industry in Johannesburg. The purpose of the study is to understand how environmental factors are impacting the fashion industry.

I would like to kindly invite you to take part in this study. You have been selected to participate in this study because you are involved in the fashion industry in Johannesburg. I have a few questions that I will ask you for approximately 30 minutes to a maximum of one hour. The interview will be brief, and we can have the interview in your office or outside if you would prefer to speak to me outside. I will be recording our discussion with your consent and will also be taking notes with your consent.

Your participation is entirely voluntary and refusing to participate will not prejudice you or your organisation in any way. There will be no remuneration for the study. Your responses will be entirely anonymous, and I will not in any way use your name, organisation or your responses to identify you in the research findings and the research report. Your responses will be safely stored in a safety deposit box with a key or password. You may choose to stop the interview or withdraw at any time. If you have any concerns or complaints regarding the ethical procedures of this study or need any further clarification, you are welcome to contact the University Human Research Ethics Committee (Non-Medical), telephone +27(0) 11 717 1408, email Shaun.Schoeman@wits.ac.za

Yours sincerely

Nyasha Grace Gatawa, 0311578v@students.wits.ac.za, 0648265161

Alex.Wafer@wits.ac.za

APPENDIX H: CONSUMER SURVEY

School of Geography, Archaeology and Environmental Studies
Private Bag 3, Wits 2050, South Africa Enquiries: GEOGRAPHY: TEL: +27 11 717-6503 • Fax: +27 11 403-7281
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http://www.wits.ac.za/geography/
UNIVERSITY OF THE WITWATERSRAND JOHANNESBURG

QUESTIONNAIRE ON ENVIRONMENTAL SUSTAINABILITY FOR CONSUMERS

My name is Nyasha Grace Gatawa and I am a PhD student in Geography at the University of the Witwatersrand and would like you to fill in a short questionnaire on environmentally sustainable fashion brands also known as responsible fashion brands or ecologically friendly fashion products. The questionnaire is a very short questionnaire and will take only 20 minutes or less to complete. Your assistance will be appreciated.

ABOUT THE CONSUMER

Gender:

Age range

18 - 21   22 – 30   31 – 40   41 – 50   50+

Location

1. How important are environmental factors such as the type of textiles/fabrics used, the way in which the clothes have been manufactured, water usage and waste management as well as any other environmental related factors to you when selecting clothes to buy?

    - Very Important
    - Important
    - Moderately Important
    - Of Little Importance
    - Unimportant

2. What other factors do you consider when selecting clothes to buy?

3. How often do you buy new clothing?

4. Where do you buy your clothes and why?

5. Are you aware of sustainable fashion brands i.e. brands that have been made to incorporate good environmental practices?

YES NO

6. Have you purchased environmentally friendly clothing or clothing that is sustainable or responsible?

Yes No

7. If yes, please indicate what specific items you purchased?

8. Why did you choose to purchase fashion products that are environmentally friendly or sustainable?

9. If not, would you consider purchasing environmentally friendly or sustainable fashion brands?

10. Have you ever purchased other types of environmentally friendly products such as eco-friendly/organic food or ecologically friendly cosmetics?

11. How do you dispose of old clothing or clothing that you no longer want to wear or need?

12. Do you have any other comments regarding sustainable fashion brands or environmental factors in the fashion industry?

Thank you for your time. I appreciate your assistance.

IN CONCLUSION,

IN MEMORY…..

- EMERITUS PROFESSOR, **TONI MORRISON OF PRINCETON UNIVERSITY** WHOSE BOOKS CONTINUE TO INSPIRE MY ACADEMIC JOURNEY.

- TO THE INDOMITABLE ICONIC **WANGARI MAATHAI, WINNER OF A NOBEL PRIZE WHO WAS A CHAMPION FOR THE ENVIRONMENT, A KENYAN, AND A GLOBAL CITIZEN**.

……………………………………………………………………….

IN RECOGNITION OF THE INDOMITABLE DAME JANE GOODALL, WHO FIGHTS A FIGHT FOR THOSE WHO SHARE OUR PLANET. LIVESTRONG!

THE END