

DURBAN UNIVERSITY OF TECHNOLOGY

**CRITICAL SUCCESS FACTORS AND EXTERNAL SUPPORT OF RETAILING
FASHION DESIGN ENTREPRENEURS: A COMPARISON BETWEEN
SELECTED AREAS IN GERMANY AND SOUTH AFRICA**

BY: BOITUMELO POOE

AUGUST 2025



DURBAN UNIVERSITY OF TECHNOLOGY
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DESIGN ENTREPRENEURS: A COMPARISON BETWEEN SELECTED AREAS IN
GERMANY AND SOUTH AFRICA**

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at the Durban University of Technology

By: BOITUMELO POOE

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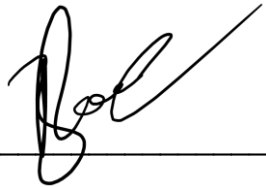
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DECLARATION

I, Boitumelo Poee, hereby declare that this thesis, submitted for a PhD in Management Sciences specialising in Retail Management, has not been submitted in part or in full for any other degree or to any other institution of higher education and that this is my investigation and research. I further declare that all sources were referenced and acknowledged as indicated in the references.

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ABSTRACT

This study presented a comparative analysis of the critical success factors of fashion design entrepreneurs within the retail industry, focusing on the distinct markets of South Africa and Germany. The recognised problem was that the specific critical success factors for retailing fashion design entrepreneurs had not been clearly identified, making it difficult to assess the influence and relevance of available external support. Therefore, this study pinpointed these critical success factors and determined how external support can be optimised to effectively direct resources towards the factors. There were thus two main assumptions to this study; first, for retailing fashion design entrepreneurs to succeed, they required external support. The second assumption was that institutions or organisations supporting fashion design entrepreneurs aimed to influence the critical success factors of fashion businesses significantly. Through a comprehensive examination of the various theories, this study aimed to bridge the gap in existing literature, offering a perspective on the interplay between retail strategies, intrinsic factors, and external support mechanisms across different countries. Overall, one framework and four theories were integrated throughout this study: the natural selection theory, retail mix framework (in relation to the retail strategy matrix), and the kano model, applied for the conceptualisation and analysis of this study; the shopping preference theory and the balanced scorecard theory implemented for interpretation purposes and to offer a clear industry and academic outline. The explanatory mixed-methods approach that blended quantitative and qualitative analyses was adopted to determine the critical influences of localised support strategies for retailing fashion design entrepreneurs. First, a consumer survey was conducted in both South Africa ($n = 511$) and Germany ($n = 532$) to determine critical success factors of retailing fashion design entrepreneurs from a market perspective. A non-probability sampling with quotas was conducted in this respect, to ensure representativeness. Second, retailing fashion designers were interviewed in South Africa ($n = 9$) and Germany ($n = 6$) to evaluate the influence and relevance of external support, in relation to the critical success factors identified with consumers. The limitations and delimitations of this study were due to the depth and breadth shaped by the sample size, quotas reached, the operationalisation construct applied and the reach of the geographical area. For instance, the factors operationalised were based solely on the retail mix, while the quota (for the sample size) predominantly

represented LSM 7 in South Africa and a monthly net household income between € 3001 to € 5000 in Germany. Additionally, the limited scope of geographic areas studied, only included South Africa and Germany to draw comparative insights from two markedly different market environments.

The findings revealed, while there were common critical success factors across both markets, which were the retail place, slow fashion products, and refocusing of price, there were also distinct differences influenced by local market dynamics, consumer behaviour, and the availability of external support. For instance, in South Africa, the emphasis on leveraging local identity and overcoming logistical challenges stood out; whereas in Germany, the focus was more on technological adoption and integration into the global market. This comparative study highlighted the importance of context-specific strategies and the adaptability of fashion design entrepreneurs to their unique retail market conditions. The implications of this research provided valuable insights; first for fashion designers, by providing critical factors they should focus on in retail to leverage consumer patronage, which is omnichannel retailing as a form of place and functional slow fashion products. While for external support organisations, industry, retail stakeholders, and policymakers, the study provided clear outlines for crafting supportive ecosystems that nurture entrepreneurship and economic growth within the fashion retail sector. For example, providing streamlined and less bureaucratic processes, centralised information hubs related to support available, and a financing structure for retailing fashion design entrepreneurs in South Africa and Germany. For the scientific community, this study offered a unique perspective of the retail mix within the context of retailing fashion design entrepreneurs, providing streamlined retail mix factors found through exploratory factor analysis. As a result, instead of 6Ps, this study found retailing fashion design entrepreneurs should focus on 5Ps as their retail mix and 2Ps as critical success factors. In summary, this study advocated for an integrated approach combining academic theories with strategic business practices for external support organisations, tailored to each market's critical success factors for retailing fashion design entrepreneurs.

Keywords: *Fashion Design Entrepreneurs, Retail Industry, Critical Success Factors, Comparative Analysis, South Africa, Germany, Retail Mix Framework, Kano Model*

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TABLE OF CONTENTS

DECLARATION	i
ABSTRACT	ii
ACKNOWLEDGEMENTS	iv
TABLE OF CONTENTS	v
LIST OF FIGURES	ix
LIST OF TABLES.....	x
ACRONYMS AND ABBREVIATIONS	xii
LIST OF APPENDIXES	xiii
CHAPTER ONE: INTRODUCTION.....	1
1.1 BACKGROUND AND RATIONALE OF THE STUDY	2
1.2 RESEARCH PROBLEM.....	3
1.3 RESEARCH AIM AND OBJECTIVES	5
1.4 RESEARCH APPROACH	7
1.5 STRUCTURE OF STUDY	9
1.6 CHAPTER SUMMARY.....	10
CHAPTER TWO: LITERATURE REVIEW - FASHION RETAIL MIX	12
2.1 NATURAL SELECTION THEORY	13
2.2 THE RETAIL MIX FRAMEWORK	14
2.2.1 Place - Fashion Retail.....	16
2.2.2 Fashion Products.....	22
2.2.3 Fashion Pricing	29
2.2.4 Fashion Promotion.....	33
2.2.5 Fashion Presentation	37
2.2.6 Fashion Personnel.....	40
2.3 THEORETICAL FRAMEWORK	43

2.4	CHAPTER SUMMARY	45
CHAPTER THREE: FASHION INDUSTRY CONTEXT		47
3.1	FASHION DESIGN ENTREPRENEURSHIP.....	47
3.2	RETAIL STRATEGY MATRIX THEORY	63
3.2.1	Trade Area Demand (TAD): Consumers.....	64
3.2.2	Trade Area Geography (TAG): External Support.....	71
3.2.3	Trade Area Heterogeneity (TAH)	83
3.3	THEORETICAL FRAMEWORK FOR CHAPTER 3	86
3.4	CHAPTER SUMMARY	87
CHAPTER FOUR: METHODOLOGY		88
4.1	RESEARCH PARADIGM AND DESIGN	88
4.2	QUANTITATIVE APPROACH	91
4.2.1	Operationalisation of Theoretical Construct (Variable Operationalisation)	92
4.2.2	Quantitative Sample Design	105
4.2.3	Quantitative Reliability and Validity	108
4.3	QUALITATIVE APPROACH	109
4.3.1	Qualitative Theory Building	110
4.3.2	Qualitative Sampling	118
4.3.3	Qualitative Reliability and Validity	119
4.4	PILOT TESTING	121
4.5	ETHICAL CONSIDERATIONS	122
4.5.1	Informed Consent	123
4.5.2	Anonymity and Confidentiality.....	123
4.5.3	Protecting Participants from Harm	124
4.6	CHAPTER SUMMARY	125
CHAPTER FIVE: DATA ANALYSIS AND FINDINGS		127
5.1	QUANTITATIVE ANALYSIS.....	128

5.1.1 Actual Sample Size.....	129
5.1.2 Demographic Descriptive Statistics	132
5.2 EXPLORATORY FACTOR ANALYSIS AND RELIABILITY/VALIDITY TESTS..	136
5.3 DESCRIPTIVE STATISTICS OF FACTORS.....	143
5.3.1 Kano Model Analysis	145
5.3.2 Regression Analysis and Hypothesis Testing	149
5.3.3 Summary of Quantitative Results	169
5.4 QUALITATIVE ANALYSIS	171
5.4.1 Sample Description.....	172
5.4.2 Data Interpretation and Narratives	173
5.4.3 Summary of Qualitative Results.....	207
5.5 CHAPTER SUMMARY	211
CHAPTER SIX: DISCUSSION OF FINDINGS.....	213
6.1 OBJECTIVE 1: CONSUMER NEEDS TO PATRONISE RETAILING FASHION DESIGN ENTREPRENEURS	214
6.2 OBJECTIVE 2: CRITICAL SUCCESS FACTORS FOR RETAILING FASHION DESIGN ENTREPRENEURS	217
6.2.1 Place: Omnichannel Preferences	218
6.2.2 Slow Fashion Product.....	219
6.3 OBJECTIVE 3: EXTERNAL SUPPORT CLASSIFICATION.....	226
6.4 OBJECTIVE 4: RETAILING FASHION DESIGNERS NEEDS FROM EXTERNAL SUPPORT	229
6.4.1 Attainable Support Information	230
6.4.2 External Support Challenges	231
6.4.3 Impact of External Support	232
6.4.4 Financial Support Needs	234
6.4.5 Recommendations from Retailing Fashion Design Entrepreneurs	236

6.5	CHAPTER SUMMARY	238
CHAPTER SEVEN: CONCLUSION AND RECOMMENDATIONS		239
7.1	RECOMMENDATIONS	240
7.1.1	Customer Perspective	240
7.1.2	Financial Perspective.....	242
7.1.3	Internal Business Processes Perspective	245
7.1.4	Learning and Growth Perspective.....	247
7.2	IMPLICATIONS OF RESEARCH	250
7.2.1	Theoretical Implications	250
7.2.2	Practical Implications	252
7.3	LIMITATIONS AND DELIMITATIONS.....	254
7.4	SUGGESTIONS FOR FUTURE RESEARCH	255
7.5	FINAL REFLECTIONS AND CONCLUSION.....	257
REFERENCES.....		259

LIST OF FIGURES

Figure 1: Chapter 1 Outline	1
Figure 2: Conceptual Framework	9
Figure 3: Chapter 2 Outline	12
Figure 4: The Total Product Concept	23
Figure 5: Hierarchy of Fashion Products	24
Figure 6: Chapter 3 Outline	47
Figure 7: Balanced Scorecard Theory	62
Figure 8: Kano Model	68
Figure 9: Determinants of Shopping Preference Theory	70
Figure 10: Conceptual Framework of Trade Area Demand (TAD)	70
Figure 11: Qualitative Theoretical Framework with Fashion Designers	86
Figure 12: Chapter 4 Outline	88
Figure 13: Explanatory Sequential Design	90
Figure 14: Research Model	105
Figure 15: Chapter 5 Outline	127
Figure 16: Comparative Data for Gender	133
Figure 17: Comparative Data for Age	134
Figure 18: Comparative Data for Monthly Net Household Income	135
Figure 19: Comparative Data for Education	136
Figure 20: Research Model Adaptation of EFA	142
Figure 21: Hierarchy Chart for Findings in South Africa	209
Figure 22: Hierarchy Chart for Findings in Germany	211
Figure 23: Chapter 6 Outline	213
Figure 24: Retail Mix Kano Movements	217
Figure 25: Critical Shopping Preference Theory Model/Framework	225
Figure 26: Chapter 7 Outline	239
Figure 27: Balanced Scorecard for Retailing Fashion Designers & External Support	250

LIST OF TABLES

Table 2.1: Quantitative Theoretical Framework with Consumers	45
Table 3.1: Retail Strategy Matrix	63
Table 3.2: Breakdown of Identified External Support in Germany and South Africa	83
Table 4.1: Operationalisation Construct	93
Table 4.2: Quota Sampling Germany	107
Table 4.3: Quota Sampling South Africa	108
Table 4.4: Qualitative Operationalisation Framework.....	111
Table 5.1: Quality Check of Conflicting Answers.....	130
Table 5.2: Impact on Mean Values: Testing Difference in Quota Reached	131
Table 5.3: Targeted and Achieved Quotas.....	132
Table 5.4: Exploratory Factor analysis with Varimax Rotated Component Matrix ..	140
Table 5.5: Descriptive Statistics - Mean Values and Standard Deviations	145
Table 5.6: Kano Analysis Table of Customer Requirements	147
Table 5.7: Kano Results of Customer Requirements	149
Table 5.8: Regression Analyses for Omnichannel Preference	153
Table 5.9: Significance of Mean Values, Omnichannel Preferences	153
Table 5.10: Regression Analyses for Authentic Localism.....	155
Table 5.11: Significance of Mean Values, Authentic Localism	156
Table 5.12: Regression Analyses for Product Exclusivity.....	157
Table 5.13: Significance of Mean Values, Product Exclusivity	158
Table 5.14: Regression Analyses for Product Functionality	159
Table 5.15: Significance of Mean Values, Product Functionality	159
Table 5.16: Regression Analyses for Product Equity	161
Table 5.17: Significance of Mean Values, Product Equity	161
Table 5.18: Regression Analyses for Price Premiums	163
Table 5.19: Significance of Mean Values, Price Premiums	163
Table 5.20: Regression Analyses for Promotional Presentation	165
Table 5.21: Significance of Mean Values, Promotional Presentation	167
Table 5.22: Regression Analyses for Personal Interaction.....	168
Table 5.23: Significance of Mean Values, Personal Interaction	169
Table 5.24: Summary of Quantitative Results	170
Table 5.25: Categories of Retailing Fashion Design Entrepreneurs.....	173

Table 5.26: Proposition and Codes Summary	174
Table 5.27: General External Support Questions and Codes.....	175
Table 6.1: External Support Requirements South Africa Compared to Germany	229
Table 7.1: Breakdown of Financial Support Needs	240

ACRONYMS AND ABBREVIATIONS

BDS	Business development services
BSC	Balanced Scorecard
BSO	Business support organisation
B2B	Business-to-business
B2C	Business-to-consumer
BTE	Bund Technischer Experten
BTS	Bartlett's test
C α	Cronbach's Alpha
CTFC	Cape Town Fashion Council
CMT	Cut-make-trim
CS	Customer Satisfaction
DFF	Durban Fashion Fair
DSAC	Department of Sports Art and Culture
DSBD	Department of Small Business Development
dtic	Department of Trade, Industry and Competition
ECFDC	Eastern Cape Fashion Design Council
EFA	Exploratory Factor Analysis
ERG	Existence, relatedness and growth
HR	Human Resource
HRM	Human resource management
KMO	Kaiser-Meyer-Olkin (Kaizer normalisation measure)
LSM	Living standard measures
Phygital	Physical and digital [omnichannel elements]
SEM	Socioeconomic Measures
SME	Small and medium enterprise
SMME	Small, medium and micro enterprise
TAG	Trade area geography
TAD	Trade area demand
TAH	Trade area heterogeneity
VIF	Variance inflation factor

LIST OF APPENDIXES

Appendix A: IREC Ethical Clearance	313
Appendix B: Gatekeepers Letter – CTFC.....	314
Appendix C: Final Quantitative Survey with Consent Form & Information.....	315
Appendix D: Sample Letter Requesting Interviews	320
Appendix E: Qualitative Data Collection - Consent Form	321
Appendix F: Questionnaire For Retailing Fashion Designers.....	324
Appendix G: Single mean Values.....	326
Appendix H: Regression Analysis - Model Summary & Anova.....	329
Appendix I: Turn-it-in Report	330
Appendix J: Certificate of Editing & Authentication	331
Appendix K: Abstract for Published Conference Paper	332
Appendix L: Published DHET Journal	333

CHAPTER ONE: INTRODUCTION

"No man is an island; every man is a piece of the continent, a part of the main." These are the words of the 17th-century poet John Donne, urging for interconnectedness by comparing people to countries (Ha 2016). This ideology has guided the conceptualisation of this study, as it considers that no retailing fashion design entrepreneur is an island; and every retailing fashion designer is a result of the environment it is supported by, as a part of the main. Be that as it may, this statement does not elaborate on or prove the interconnectedness between retailing fashion designers and the supporting environment. As a result, this study sought to research the critical requirements for fashion design entrepreneurs to be successful in retail and how those fashion designers interconnect with external supporting entities to achieve this success. This analysis was conducted in Germany and South Africa, in order to evaluate the differences between the two countries.

To commence this study, this introductory chapter on the critical success factors of retailing fashion design entrepreneurs, considers the detailed content and structure covered, providing a comprehensive foundation for this study, starting with the background and rationale, the research problem, the overall aim and objectives with research questions, the research approach outlining the conceptual framework, and ending with the structure of the remaining study. Figure 1 sets the stage for this study, outlining the key chapter topics and themes.

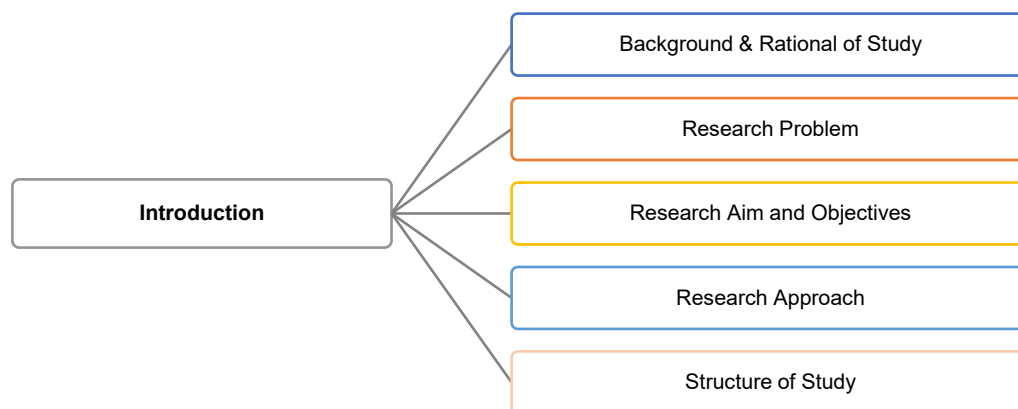


Figure 1: Chapter 1 Outline

Source: Developed by Author

1.1 BACKGROUND AND RATIONALE OF THE STUDY

New and existing retailing fashion design entrepreneurs are in search of ways to succeed in a competitive retail environment and, therefore, require significant external support in order to succeed (Kurz 2010: 53). It is the assumption of this study that external support significantly influences the critical success factors of retailing fashion designers. It is noted, over the past few decades, there has been a perceptible increase in the number of fashion design entrepreneurs in the retail environment.

Governments, economists and academics alike are found to be highly interested in the subject of entrepreneurship (Burke 2008; Brown and Thornton 2013; Hamstech 2018; Business of Fashion and McKinsey 2022). This could be due to the ultimate outcomes of entrepreneurship, which were found to continuously exhibit decreased unemployment rates, increased innovation, and positive economic structural changes (Abu-Saifan 2012: 22). Entrepreneurship has been closely linked to business creation, either out of necessity or opportunity (Fairlie and Fossen 2020: 253).

Fashion retail-related studies are essential, as the industry is projected to grow its retail sales between two to four percent in 2024, despite the uncertain economic climate (BOF-McKinsey 2023: 10). Moreover, the shift in retail dynamics, prompted by the digital revolution, presents challenges and opportunities for fashion entrepreneurs, which require further study. For instance, the ascent of e-commerce, the pivotal role of social media in marketing strategies, and the growing consumer emphasis on sustainability and ethical production, have all contributed to reshaping the operational environment for fashion designers (Bhardwaj and Fairhurst 2010; Todeschini *et al.* 2017).

Crucial to the discussion on the retail-focused success of fashion entrepreneurs, is an understanding of how fashion designers engage with external support mechanisms. Such mechanisms, ranging from financial backing to strategic partnerships and market access facilitation, play a pivotal role in amplifying a designer's reach and impact within the retail sphere.

Overall, the fashion industry is one of the creative industries that has governed the international agenda related to economic growth and funding worldwide (World Economic Forum 2020). Rightly so, as the fashion industry is considered a significant revenue contributor on a global scale, with a projection of worldwide revenue contribution in excess of one trillion Euros (which is more than twenty trillion Rands) for 2024. With this global revenue, Germany is projected to be the sixth largest contributor, contributing above sixty billion Euros (after the United States of America - USA, China, India, Japan and the United Kingdom - UK), with South Africa projected as the 39th contributor, with just more than five billion Euros (over one-hundred billion Rand) (Statista 2024).

These statistics reflect a significant gap between these two countries, with the likelihood to impact the fashion retail markets differently, as it was previously found, global growth and differentiation have a tendency to impact the performance of a firm (Parnell, Troilo and Dobbelsstein 2024: 10) and, potentially, an industry. However, the factors influencing these differences in the retail fashion industry between the two countries remain unknown. That is the reason this study sets out to explore/analyse the relationship between critical success factors and external support amongst fashion design entrepreneurs in the retail environment in these two countries.

1.2 RESEARCH PROBLEM

The major problem that led to the conceptualisation of this study emerged from the researcher's previous study, which established that the external support South African fashion designers received was fragmented, limited, and exclusive (Pooe 2020: 174). The study further found this fragmented external support affected the intended output level. Particularly since the support would be uncoordinated and lacked strategic alignment supporting fashion retail industries. The problem with limited support, is that only a fraction of retailing fashion design entrepreneurs received support, resulting in exclusivity, thus neglecting a larger percentage of retailing fashion design entrepreneurs.

An earlier study (Pooe 2020) focused on the development of an effective and sustainable supply-chain-management model for South African fashion designers in the retail clothing industry. However, the study did not explore how consumer

expectations and purchasing behaviours intersect with fashion designers and external support structures, nor did it provide a comparative analysis with other economies such as Germany. These are gaps this particular study intends to close, especially the absence of consumer-driven insights as benchmarking guidelines for a more integrated approach to understanding the critical success factors for retailing fashion design entrepreneurs. Moreover, the 2020 study did not sufficiently examine how external support could be tailored to these success factors to foster sustainable growth and competitiveness.

This study therefore builds on the empirical foundation of Poee (2020) by offering the “how” through data-driven insights into the operational factors and support mechanisms necessary to implement some aspects of a sustainable and effective supply chain models for fashion designers in retail. It does so by integrating consumer expectations, designers’ operational needs, and the role of external support, while also expanding the geographic scope to include Germany. This comparative lens allows the current study to uncover scalable strategies and context-sensitive interventions. Overall, previous empirical studies have focused more on the general support structures of entrepreneurs or small and medium enterprises (SME) in creative and other sectors, instead of just focusing on fashion design entrepreneurs (Virani 2015; Munro 2017; Mtisi and Muranda 2018; Dyba and De Marchi 2022; Hruskova, Mason and Herzog 2022; Matsoso and Gasela 2024). Additionally, these previous studies lend support to the identified gaps by demonstrating the limited research targeted at fashion design entrepreneurs globally, validating the relevance of this investigation, which intentionally involves targeted external support.

In light of the current economic climate, especially as a result of the COVID-19 pandemic, marked by volatility, shifting consumer priorities resulting in increased pressure on entrepreneurs, the urgency of strengthening the retail sector, providing direct access to consumers has become more pronounced. Fashion design entrepreneurs, especially those operating in retail, face intensified challenges in navigating market complexities, accessing resources, and responding to evolving consumer demands (Kiron 2024). This context reinforces the relevance and timeliness of the present study, which seeks to align external support with the actual success drivers identified by consumers and entrepreneurs alike.

The researcher believes that, with sufficient information and understanding, coordination of good policies could be formulated by external support to maximise their influence towards retailing fashion design entrepreneurs. Overall, this study's contribution lies in offering a comparative, policy-relevant model that integrates micro-level entrepreneurial needs with macro-level institutional support, thereby filling a gap in retail entrepreneurship research and guiding more inclusive, strategic interventions in the fashion retail sector.

1.3 RESEARCH AIM AND OBJECTIVES

The main aim of this study was to analyse the critical success factors of retailing fashion design entrepreneurs and link these to the external support available, in order to determine the most relevant resources required and best policies to achieve success for retailing fashion design entrepreneurs. This will establish an impactful and beneficial relationship between external support and retailing fashion design entrepreneurs.

The starting point of this study was to deliberate on the dynamic retail environment, highlighting insights influencing consumers' purchasing decisions that can empower fashion design entrepreneurs to navigate the complexities of the market effectively, achieve competitive advantage, and foster sustainable business growth. The critical success factors of retailing fashion design entrepreneurs had to be identified through the best-suited retail theory that closely links the micro and macro retail environment. It was necessary for the retail theory to provide a guideline of critical success factors in the context of the micro and macro environment, as those factors led the empirical research with consumers and also acted as a guideline to evaluate the external support needs of retailing fashion design entrepreneurs.

Essentially, the empirical research collected from consumers was used to draw out the most critical success factors, aimed explicitly at fashion designers in retail. This information will then guide external support policies and aims. Fundamentally, the critical success factors deduced from consumers were analysed as variables dependent on the external support available in South Africa and Germany. This study thus identified critical success factors, specifically directed at retailing fashion design

entrepreneurs, and contributes to new knowledge to guide external support policies achieve a greater influence on those critical success factors, which are currently unknown. The scope of influence of the external supports was also determined, in relation to the identified success factors. Ultimately, the external support required for the success of retailing fashion design entrepreneurs was provided by this study, to determine the type of resources and policies most relevant for retailing fashion design entrepreneurs.

The overall aim of this study was to explore the relationships between critical success factors and external support for retailing fashion design entrepreneurs in Germany and South Africa. Based on that, these are the objectives of this study:

1. To identify consumer needs to patronise retailing fashion design entrepreneurs.
2. To explore the critical success factors for retailing fashion entrepreneurs.
3. To classify the type of external support required in Germany compared to South Africa.
4. To determine retailing fashion designers' needs from external support in Germany compared to South Africa.
5. To propose appropriate external support policy-guidelines/framework to sustain the critical success factors of retailing fashion design entrepreneurs in South Africa and Germany [FINDINGS].

Correspondingly, the following research question emerged: What is the influence of external support resources and policies in Germany and South Africa on the critical success factors of fashion design entrepreneurs? Subsequently, to support the main research question, the following sub-questions arose:

1. What do consumers need from retailing fashion designers for continued patronage?
2. What are the critical success factors of retailing fashion design entrepreneurs?
3. What type of external support is required for retailing fashion design entrepreneurs in Germany compared to South Africa?
4. What do retailing fashion designers need from external support in Germany compared to South Africa to achieve their critical success factors?
5. What external support policy-guidelines are necessary for critical success factors of retailing fashion design entrepreneurs?

1.4 RESEARCH APPROACH

Figure 2 introduces the basic conceptual framework, mapping the process to achieve the study aims by encapsulating a synthesised view of theoretical constructs, interdependent relationships, and resultant outcomes. The core of this framework lies in the theoretical foundations that anchor the research. The theories identified in the literature review guide the empirical research with consumers and retailing fashion design entrepreneurs. The natural selection theory is positioned to provide context into the thinking behind the research topic. The retail mix framework then provided a quantitative lens through which the strategic components of retail products, price, place, promotion and presentation as well as personnel are analysed. Following this, the kano model was integrated to underscore the pivotal role of consumer satisfaction within the retail context. At the same time, the retail strategy matrix guides the discussions with retailing fashion design entrepreneurs.

An explanatory mixed-methods approach was, ultimately, employed, blending quantitative and qualitative analyses. The quantitative phase involved a consumer survey (guided by the retail mix) to identify critical success factors from a market perspective, using non-probability sampling with quotas to ensure representativeness. The qualitative phase consisted of in-depth interviews with retailing fashion designers in South Africa and Germany (integrating the retail strategy matrix), aimed at evaluating the influence and relevance of external support, concerning the identified critical success factors from consumer surveys.

The framework also explored interrelationships, highlighting the interdependent relationships essential for achieving the study aims. It examined the connection between consumer needs and retailing fashion designers, focusing on how these needs influenced the implementation of critical retail mix elements by retailing fashion designers. Furthermore, it investigated the relationship between retailing fashion designers and external support, analysing how such support enhances the capabilities of fashion designers to address critical success factors.

The outcome variables section outlined the results expected from the interplay of theoretical foundations and interrelationships. One key outcome was that retailing

fashion designers would focus on identified critical success factors, enhancing their success in the market. Additionally, the framework aimed to provide a policy-guideline and framework for external support organizations, ensuring they achieve optimal influence in supporting retailing fashion design entrepreneurs. Contextual factors were also considered within the framework, encompassing various dynamics that influenced the study.

Market and consumer dynamics include aspects such as consumer satisfaction and their influences, requiring fashion designers to adapt those market needs. Retailing fashion designers' dynamics focus on identifying their specific needs from external support organisations, based on the critical success factors identified from the market. In addition, retailing fashion designers' business needs were also considered. External support dynamics propose policies to develop a framework and examine the capabilities of external support to fulfil the business needs, in order to meet critical success factors on retailing fashion design entrepreneurs.

Overall, this conceptual framework illustrates a comprehensive approach to understanding and optimising the critical success factors and external support mechanisms for retailing fashion design entrepreneurs. By integrating various theoretical perspectives and analysing the interrelationships between consumers, fashion designers, and external support, the study aimed to provide actionable insights and strategic guidelines for fostering entrepreneurship and growth in the fashion retail sector.

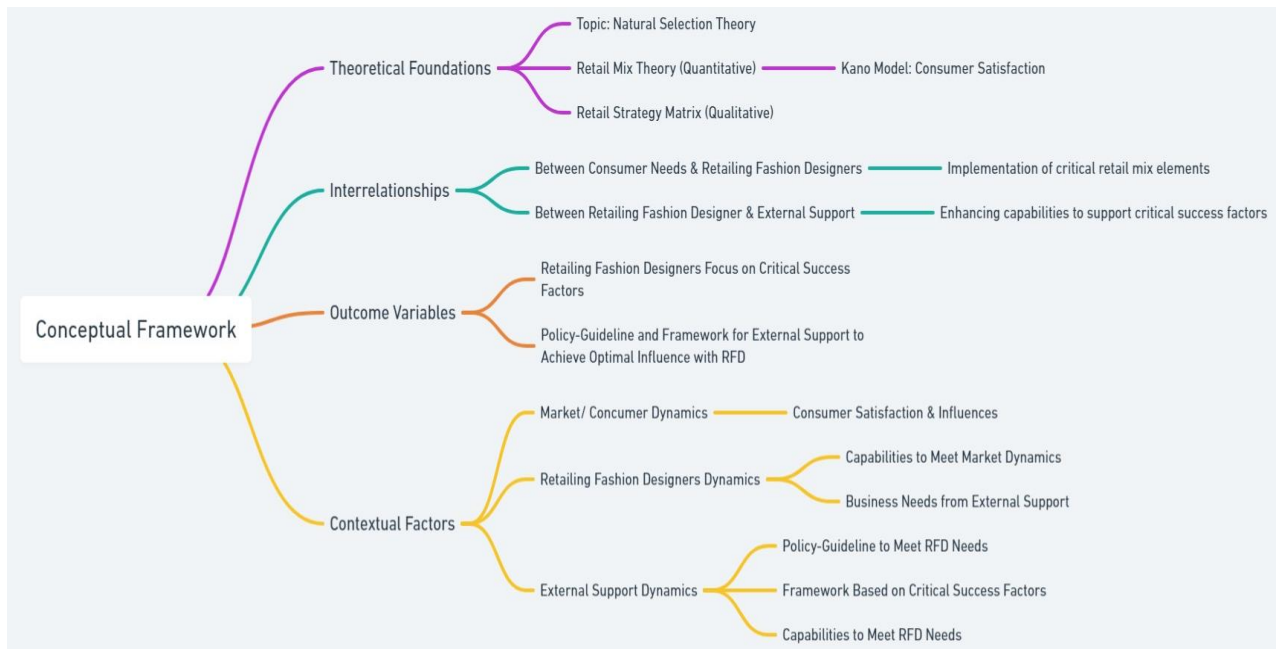


Figure 2: Conceptual Framework

Source: Developed by researcher

1.5 STRUCTURE OF STUDY

Below is the structure of this study, detailing the content of each chapter, from the literature review through to the conclusion and recommendations:

Chapter One: Introduction

The first chapter commenced with the introduction of the topic, offering an outline of the study background to justify the research. Statements related to specifying the research problem were additionally provided, followed by the research aim. The research objectives and questions were finally enumerated before the study approach and structure was detailed.

Chapter Two: Literature Review – Section One

The second chapter will examine the initial retail theory and framework applied to this study: natural selection theory and retail mix. This chapter will, therefore, focus on reviewing literature connected to quantitative research with consumers, which later links to retailing fashion design entrepreneurs. A theoretical framework will finally conclude this area.

Chapter Three: Literature Review – Section Two

The third chapter will provide industry context related to the topic. This section will introduce the retail matrix, as it guides the qualitative research, specifically with retailing fashion design entrepreneurs. First, retailing fashion design entrepreneurship will be defined. Second, the various aspects of the retail strategy matrix will be discussed, including consumers, the current status of external support available in Germany and South Africa, and aspects of heterogeneity.

Chapter Four: Research Methodology

The fourth chapter will disclose the empirical research process from the research paradigm to the research design. Full transparency related to both the quantitative and qualitative research strategy, approach, target population and sampling methods will be provided.

Chapter Five: Analysis and Presentation of Results.

The fifth chapter will initially explain the data analysis process and then present and explain the results from the collected and analysed data to provide answers to the research questions.

Chapter Six: Discussion of Findings

The sixth chapter will link chapters two, three and five by taking the findings from the interpreted analysed data in chapter five, to discuss in relation to the literature presented in both chapters two and three.

Chapter Seven: Conclusions and Recommendations

This final chapter will consider the appropriate recommendations and summarise the research and findings. Additionally, the key differences between Germany and South Africa will be outlined, while emphasising the study contribution. In the final notes, reflections and recommendations for further research will be specified. The chapter will end with a discussion related to the limitations and delimitations of the study.

1.6 CHAPTER SUMMARY

This introductory chapter laid a foundation for understanding the critical success factors of fashion design entrepreneurs, within the retail landscape of South Africa and

Germany. The research problem, derived from observed gaps in external support and its alignment with the needs of retailing fashion design entrepreneurs, sets the course of this study. The aim and objectives were designed to guide the exploration of the problem, aiming to bridge the divide between existing support structures and the articulated needs of fashion designers within the different markets.

This chapter was, therefore, a strategic overview of the intended research path. Drawing out the conceptual framework highlights this study's relevance, contributing to the broader discourse on the global fashion industry, providing a contextual benchmark for evaluating the success factors and external support mechanisms in the retail fashion sector. By doing so, it aims to offer valuable insights that could influence policy-making and strategic decision-making in fashion retailing, ultimately enhancing the competitive edge and sustainability of fashion designers in retail.

As this study progresses, the subsequent chapters will more thoroughly examine the theoretical frameworks and empirical research methodologies. Therefore, moving forward, chapter 2 (the literature review) and the rest of this study, will build on the foundation laid in this chapter, focusing on the theoretical aspects that support the research questions and objectives.

CHAPTER TWO: LITERATURE REVIEW - FASHION RETAIL MIX

The previous chapter introduced and offered the basis of this study. This chapter outlines the literature supporting the research aim, objectives and questions discussed in chapter 1. The overall purpose of this chapter is to review the fundamental theory and framework applied to this research. The first section will review the guiding theory of the research topic, the natural selection theory. The second section will examine the different variables related to the retail mix framework: place, product, pricing, and promotion, as well as presentation and personnel. At the end of this chapter, the theoretical framework will be discussed.

This chapter will ultimately support the previously stated research aim through literature, by evaluating critical success factors of retailing fashion design entrepreneurs. The retail mix will be reviewed to identify the indicators that can potentially be empirically tested to answer the first research question and determine the first research objective. By applying the retail mix, this chapter will guide the discussion related to what consumers potentially need from fashion design entrepreneurs for continued patronage.

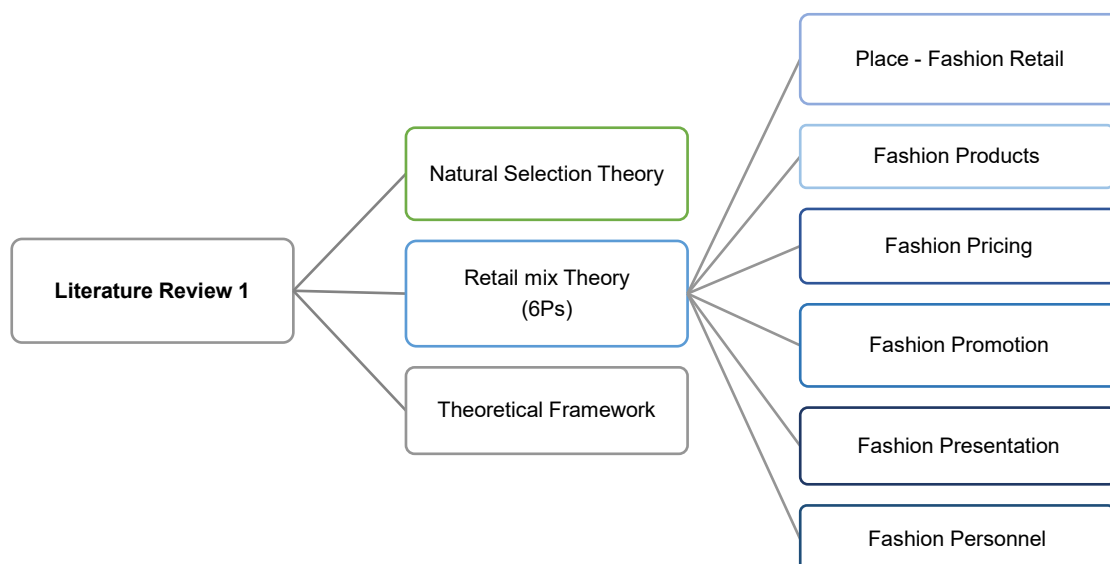


Figure 3: Chapter 2 Outline

Source: Developed by Author

2.1 NATURAL SELECTION THEORY

Similar to how organisms adapt to their environments through natural selection, fashion entrepreneurs must navigate an ever-evolving marketplace, where the preferences of consumers and the availability of external support shape the trajectory of success. This is achieved by exploring the critical success factors of retailing fashion design entrepreneurs and the influence of external support mechanisms across diverse socio-economic contexts, such as Germany and South Africa. Charles Darwin founded the natural selection theory, with the philosophical principle that states “all life on earth is connected and related to each other”, as a result of “modifications of populations by natural selection, where some traits were favoured in an environment over others” (Richmond n.d., cited by Kuksov and Wang 2013; Than 2018: 292). This principle is the underlying philosophy behind the main study topic: the success of retailing fashion entrepreneurs is connected and related to external support, and consumers favour some retail traits over others.

At the core, natural selection theory is defined as an evolutionary process by which organisms adapt to their environment to survive and then pass on those survival traits to the following generation, resulting in the alteration and adaptation of the environment and its organisms (Patanella 2011). For this process to occur, there are three main requirements: (i) the characteristics, such as morphology, physiology and behaviour of an organism should differ, (ii) some variations of the organism must be transferable, and (iii) the variation of the organisms should differ in their ability to survive and reproduce (Smith and Winterhalder 1992: 26). The primary ‘organisms’ in question in this study, are retailing fashion design entrepreneurs, consumers, and external support organisations.

In retailing, the theory of natural selection has been adapted to explain how businesses evolve in response to environmental pressures such as technological change, consumer behaviour, and competitive dynamics by arguing that only those retailers who effectively respond to external changes like economic, technological, and cultural, can survive and thrive (SLM.MBA 2025). This analogy positions the marketplace as an ecosystem where retailing fashion designers and external support must continuously adapt or risk extinction or relevance. Meaning, when the natural selection theory is correctly applied, retailers should be able to evolve and adapt to all

environmental changes to survive (UKEssays 2018). Furthermore, applying the natural selection theory has been previously associated with efficient resource allocation, as the approach differentiates and eliminates performance levels of organisations according to profitability or efficiency (Nishimura, Nakajima and Kiyota 2005: 54).

In the context of fashion design entrepreneurs, adaptability is not only about product innovation but also about navigating consumer needs and institutional support structures. Galor and Michalopoulos (2011: 1) argue that entrepreneurial traits themselves evolve through natural selection, with risk-tolerant and growth-promoting behaviours gaining evolutionary advantage in early development stages. This insight is particularly relevant for emerging fashion design entrepreneurs in South Africa and Germany, where institutional support and consumer expectations may differ due to the difference in economic structures and developmental phases.

“The objective of natural selection theory is to explain and predict changes in the relative frequencies of heritable traits within a population” (Walsh, Lewins and Ariew 2002: 460). Thus, the retail and external support traits will be reviewed to predict changes in the relative frequencies and heritable traits, discussed in the chosen retail framework and external support characteristics, with fashion design entrepreneurs and consumers as the main population.

Ultimately, fashion can be evaluated as a means of natural selection, as it creates mechanisms for survival in distinct environments (Pontia 2014). Therefore, the theory offers a lens to examine how external support mechanism, such as councils, government departments, incubators, policy incentives, and mentorship programmes act as environmental mechanisms that either enable or hinder entrepreneurial survival.

2.2 THE RETAIL MIX FRAMEWORK

The first objective of this research was to identify consumer needs to patronise retailing fashion design entrepreneurs. Those consumer needs will ultimately guide the appropriate retail factors that external support should focus on, as critical success factors of retailing fashion design entrepreneurs in South Africa and Germany. Accordingly, the retail framework and theories chosen for this research integrate

various factors in fashion retail that directly impact the market. Furthermore, the framework and theories chosen consider consumers, and last, they can be applied to innovators such as fashion designers.

Retail frameworks and theories, in particular, retail marketing theories, are focused on attracting consumers to different store typologies and online stores. In contrast, the retail mix framework has been regarded as a preferable framework for attracting the most customers to increase retail revenue (Kennedy 2013: 1). Later, Wen, Choi and Chung (2019: 40-42) also identified various factors necessary to fashion retailing that can be associated with the retail mix and trade area framework, including supplier selection, market selection, channel selection, and inventory management, as well as in-store operations, pricing strategies, selling strategies and product operations.

The retailing mix was initially developed by William Lazer and Eugene J. Kelley and portrayed the retail management process with three original sub-mixes, which are the goods and service mix, communication mix and physical distribution mix (Rosenbloom 1976: 60). On the one hand, with the goods and service mix, it is essential to note there are specific benefits and features with particular relevance for consumers, hence, for the development of goods and service mix, customer perspectives need to be taken into consideration (Reddy 2015: 240). On the other hand, the communication mix includes various promotional efforts such as advertising, personal selling, sales promotion, and public relations (PR), along with [social media] and direct marketing, usually employed by an organisation to communicate customer value and build customer relationships (Todorova 2015: 369). The physical distribution mix then ensures the products and services are moved from producer to customer and involve components such as inventory, warehousing, communication, and unitisation, as well as transport (Freedman 2021).

The retail mix enables retailers to initiate specific ideas and then define and drive strategies through specific goals (Wroblewski 2018). There is a clear relationship between the retail mix and consumers, with retail mix elements affecting customers' purchase levels and retailers' market share (Ingene 2014: 282). Moreover, retail influences consumers' buying decision process, while findings also indicate a relationship between the retail mix, consumer needs satisfaction and customer loyalty

patronage (Chowdhury 2015: 109; Terblanche 2017: 1-10). However, retailers need to determine the right retail mix combination for consumer satisfaction and then offer the right mix with superior attributes that fulfil needs and solve problems to achieve added customer value (Chowdhury 2015: 131). It was previously realised that consumers prioritised specific retail mix elements based on the type of retailer (Terblanche 2017: 10). With that in mind, for this study, the right retail mix combination will be identified as a critical success factor for retailing fashion design entrepreneurs and reorganised to increase consumer patronage, as well as benefit consumers and retailers, when taking the changes within the environment into account (Ingene 2014: 291).

The most recent research, has simplified the retail mix to represent the 6-Ps of retailing, namely, products, promotion, personnel, and presentation, as well as place and price (Terblanche 2017: 2). Over and above this, retail mix framework interlinks and adds value to the fashion merchandising concept associated with the buying and selling of fashion products for retail, by considering product assortment planning, product acquisition, pricing, and presentation, as well as sales (Burns and Mullet 2020: 3).

2.2.1 Place - Fashion Retail

Place is also referred to as distribution and can be a complicated system, dependent on local conditions, technical feasibility, transportation and other conditions subject to how the business chooses to ensure products are accessible to consumers (Išoraitė 2016: 32). At the core, place deals with allocating the right product, at the right time and the right place, using several types of sales channels such as; (i) direct routes, for example, online shopping, (ii) service-orientated channels, such as brick-and-mortar retail, (iii) concession models operating within another store, (iv) public events, for instance, fashion events, and (v) trunk shows, online trunk shows or preview events (Savage 2015: 47).

With the existing fast-changing and diverse environment, it is argued it is essential to review the discourse of innovation and successful retail formats outside the context of deliberate over-formalised design, through opportunistic and incremental processes

that create winning formats (Reynolds *et al.* 2007: 658). In recent times, the concept of omnichannel retailing has been developed, established as a format with the potential to drive consumer patronage in the fashion industry (Cattapan and Pongsakornrungrungsilp 2022: 2). The types of consumers more inclined to omnichannel formats, have been proven to have a high level of fashion innovativeness and opinion leadership (Cho and Workman 2011: 376; Ryu 2019: 20). Thus, for fashion design entrepreneurs to meet the industry and consumer expectations adequately, it is crucial to understand the perceived usefulness of omnichannel retailing, the intention to use multiple channels and the level of patronage towards omnichannel retailing (Mosquera *et al.* 2019: 699; Ryu 2019: 18; Banik 2021: 6).

In terms of perceived usefulness, omnichannel retailing emphasises the need for integrated retail channels to provide a seamless customer experience across various channels (Rusanen 2019: 11). More specifically, omnichannel is defined as “the set of activities involved in selling merchandise or services through more than one channel or all widespread channels, whereby the customer can trigger full channel interaction and/or the retailer controls full channel integration” (Beck and Rygl 2015: 175). Simply defined, omnichannel retailing provides consumers with the alternative to shop at any time and any place (Kopot and Cude 2021: 15).

In essence, the traditional notions of retail formats, retail place and retail design are challenged by the evolving role of the physical store as a place of the transaction, to a place at which different channels of retailers interact, joined together by technology (Alexander and Cano 2019: 218). Omnichannel retailing is basically regarded as useful, as it enhances customer satisfaction by allowing consumers to interact with the brand in ways that suit their preferences and lifestyles (Verhoef, Kannan and Inman 2015: 176). For fashion design entrepreneurs, useful omnichannel strategies can increase reach and facilitate greater customer engagement by integrating touchpoints, leading to higher conversion rates and sales (Cao and Li 2015: 198).

To increase the intention of consumers to use multiple channels and increase patronage intention, technology is undoubtedly at the forefront of omnichannel retailing, as mobile, digital technologies and their applications are developed to offer consumers the option to shop offline/physical stores, online/websites or through

mobile applications channels, simultaneously or spontaneously, during one shopping trip (Ryu 2019: 15, 16). Confirming these sentiments, Business of Fashion and McKinsey (2022: 7), in their “The State of Fashion Technology Report”, emphasised fashion brands needed to leverage technologies to amplify the omnichannel customer experience, in order to bridge the gap between online and offline channels. The term “phygital” has been established to combine the physical and digital elements of luxury omnichannel, to create unique shopping experiences and consumer patronage (Banik 2021: 102739). With this in mind, retailers should concentrate on leveraging the vast capabilities of “phygital” retailing for exceptional consumer experience (Pangarkar, Arora and Shukla 2022: 8), which could potentially increase consumers' patronage intention.

For example, in fashion retailing, consumer-facing technologies could provide an integrated experience for retail brands through digital technologies, online retailing and brick-and-mortar channels (Perry, Kent and Bonetti 2019: 169). Furthermore, through omnichannel retailing, consumers are able to use mobile applications without delay or travel to other locations, when the desired colour or size is not available at the store initially visited (Ryu 2019: 20). Ultimately, an omnichannel fashion retailing environment that integrates the retail mix well, has the potential to reduce perceived risk by consumers, act as a strong shopping motivator, increase consumer satisfaction and increase sales (Cattapan and Pongsakornrunsilp 2022: 15). After reviewing the literature mentioned above, it has become apparent that recent research and the current fashion industry (Business of Fashion and McKinsey 2022) consider omnichannel retailing as a useful, relevant and appropriate retail ‘format’ classification for any fashion retail business, including fashion design entrepreneurs.

To appropriately consider omnichannel retailing, this research deemed it necessary to adequately define retail formats that can be integrated into the structure. For instance, e-commerce retailing has grown immensely over the past years. E-commerce retailing is projected to continue growing as it supports remote online shopping using desktops, laptops, smartphones, mobile applications or video commerce (Burns and Mullet 2020: 235). E-commerce retailing success factors include proximity to shipping terminals, space availability for expansion, ease of access for employees, and cost of renting, along with taxes and other charges such as delivery costs (Diamond, Diamond and

Litt 2015: 125-126). The global fashion e-commerce industry is projected to remain the most significant business-to-consumer (B2C) market, as its compound annual growth rate continues to increase by 9.1 percent, with apparel as the most crucial contributor (Rotar 2021: 4). The growth of the global e-commerce fashion industry has been attributed to expanding global markets, increasing online access, smartphone penetration, and emerging worldwide middle classes with disposable income, in addition to innovating technologies creating online experiences, and the connection to the celebrity/influencer culture (Orendorff 2021).

Notwithstanding the increasing online market, the offline market still accounts for the majority of fashion retail sales in the world (Rotar 2021: 13). One of the traditional offline retail channels is the brick-and-mortar channel, which refers to a B2C business that offers its products and services face-to-face at a location the business rents or owns (Murphy 2020). Burns and Mullet (2020: 226-235) identified department stores, speciality retailers, pop-up stores, and chain stores, as well as discount retailers, off-price retailers, rental and resale retailers, and contractual retailers as retail brick-and-mortar channels that offer fashion products. Specifically, retailing fashion design entrepreneurs have been identified to operate from brick-and-mortar channels such as department stores, speciality stores such as pop-up retailers, independent retailers and boutique stores (Burns and Mullet 2020: 228; Poee 2020: 14-17).

By definition, department stores are large retailers that carry a broad but deep assortment of merchandise, with different functions and brand names, while speciality stores, also referred to as limited-line stores, offer a narrow but deep variety of products, which means speciality retailers focus more on a specific type, few, or closely related category of merchandise in a particular market (Lee 2010: 597-598). Pop-up retailers are closely associated with speciality stores, which are temporary or mobile, and frequently used to develop/introduce fashion brands to the international or national market (Varley and Trigoni 2019: 201). Independent retail stores are equally linked to speciality stores; these independently operated retailers are strongly associated with entrepreneurs and private labels, as this type of retail channel has a distinct identity driven by differentiated, innovative and creative product offerings and store environments (O'Hare, Stewart and McColl 2018: 12-13). Similarly, boutique stores are a form of speciality retail store, with product offerings focused on market

segments interested in couturiers and luxury fashion designers (Diamond *et al.* 2015: 4). All the abovementioned brick-and-mortar channels can operate as chain store retailers, should they choose to centralise retail structures, operate from several locations with similar products, and standardise retail functions (Burns and Mullet 2020: 233).

Other brick-and-mortar channels offering reduced merchandise are discounted retail stores usually owned by larger retailers, targeting the lower end of the market with mass production, lower prices, lower quality, and located at lower-cost sites (Easy 2009: 204). Furthermore, off-price retailers, such as factory outlets, independent, closeout retailers, and sample retail stores, are more specialised in offering discounted national brands, designer collections, or promotional goods. In contrast, rental and resale retailers are a growing channel that specialises in previously owned, worn or disposed fashion products (Burns and Mullet 2020: 229-231), such as out-of-season fashion designer products.

Contractual retailers are retailers who integrate their businesses with other retailers, wholesalers, producers or manufacturers, entering into a contractual agreement to increase market share; the predominant channels for fashion apparel are franchises and leased departments, otherwise known as concession agreements/models (Burns and Mullet 2020: 232). Franchising is based on a contractual agreement between the seller, referred to as the franchiser, who maintains a vested interest in part of the business acquired by the buyer, referred to as the franchisee, which receives part of the business and continues to trade under the same name, format and procedures the franchiser has developed (Easy 2009: 208). Franchising agreements have been successful in the fashion industry, as they offer tried business concepts with expertise in merchandising, specific product lines, display, and management, in addition to market share, marketing, visibility and product design (Diamond *et al.* 2015: 7-8). However, with concession agreements, producers [such as fashion designers], wholesalers, or other retailers can lease space from a more prominent retailer or host retailer, creating a form of a 'shops-within-shops' concept (Easy 2009: 209). The host retailer would then only provide the space, utilities and essential in-store fixtures and services, based on the lease agreement or commission fee; the space supplier would provide the expertise to successfully sell the product (Burns and Mullet 2020: 233).

Fashion events frequently assist fashion design entrepreneurs with routes to market, creating retail channels and opportunities such as trade fairs, trunk shows, agent showrooms and company-owned showrooms for fashion design entrepreneurs to interact with consumers, buyers from larger retailers, wholesalers and manufacturers, for potential partnerships (Savage 2015: 48-49). The largest fashion events are, on the one hand, trade fairs, the downstream platforms fashion design entrepreneurs use to exhibit their sample collections to retail buyers (Lavanga 2018: 193).

Trunk shows, on the other hand, are more focused on individual designers, retailers, wholesalers or manufacturers, and the name is derived from the original concept, where collections were showcased from trunks to a private, invited audience (Gray 2010: 155). These shows have now developed and are usually held at boutique stores or designer sections in department stores for a selected, invited audience that would not usually attend catwalk shows (Savage 2015: 47).

Showrooms are a business-to-business (B2B) alternative for retailing fashion design entrepreneurs, functioning as real-life catalogues, allowing the necessary and a minimum number of products to be presented onsite for potential buyers to interact with the styles and sizes available to order, thus, mitigating the inventory management challenges that come with traditional retail stores (Jin and Shin 2020: 4). Interestingly, omnichannel retailing has posed potential issues to showrooming, as consumers with access to showrooms seek fashion information and styles using showrooms and find cheaper alternatives online, or alternatively, seek information online and buy offline, which is referred to as webrooming (Verhoef *et al.* 2015: 175).

It is, therefore, apparent that omnichannel retailing comes with its challenges, including the complexities of maintaining consistency across different platforms, particularly for smaller retailers with limited resources (Brynjolfsson, Hu and Rahman 2013). Additionally, the investment in technology and training for staff to manage omnichannel operations can be substantial, potentially outweighing the immediate benefits for some businesses (Hübner, Holzapfel and Kuhn 2016: 257). Furthermore, the expectation for rapid fulfilment of online orders can strain logistical operations, particularly when trying to integrate in-store and online stock systems effectively; this

integration often leads to complications in inventory management, where discrepancies between online availability and physical stock can lead to customer dissatisfaction (Gallino and Moreno 2014: 4). Evaluating whether these challenges are apparent to consumers is, therefore, important, as well as whether they impact their patronage and the perceived usefulness or intention to purchase from retailers offering omnichannel strategies.

Omnichannel retailing can, nonetheless, not be disregarded, due to all the options of retail “places” available to consumers, which means the use of multiple shopping channels or touchpoints (omnichannel retailing) during one shopping trip, is fast becoming the expectation (Business of Fashion and McKinsey 2022: 11). This study holds the same sentiments as Gallino and Moreno (2014: 27) in their research, related to the integration of online and offline channels in retail, when they concluded:

“Competitive pressure from many retailers offering this multichannel experience leads to the question of to what extent the leading retail companies today have the real option of not offering a multichannel experience, even in cases when profitability might not be there yet. Our results show that multichannel integration has already happened, and the challenge for many retailers is to implement it in the most efficient way rather than deciding whether or not to do it.”

Overall, this research recognises a research gap related to how highly consumers regard “place” or omnichannel retail formats to patronise fashion design entrepreneurs and whether it is a factor that should be considered as a critical success factor in the policy-guidelines and frameworks for external support.

2.2.2 Fashion Products

With fashion, there are various types of products, which encompass menswear, womenswear, children’s-wear, and sportswear, along with functional wear, lingerie, millinery, and footwear, as well as accessories. All these different types of fashion products are then categorised into eveningwear, jeans-wear and performance wear (Cassidy and Kettley 2016: 5). More intricately, fashion products are further itemised as formal work/office wear, wedding/occasional wear, contemporary fashion, and

casual wear, as well as streetwear, resort/cruise wear, slouch/loungewear and bespoke/tailoring (Posner 2015: 10).

Levitt (1980: 85-88) developed a total product concept to prove customers buy more than the generic product, suggesting that “something” transcends the tangible and determines customer satisfaction.” At the centre of the model is the generic/core product, which is its most basic level; the second part of the circumference is the actual/expected product, which considers the basic minimum consumer expectation and tangible attributes. At the outer layer is the total/augmented product, which is everything the product provides, including the intangible qualities, branding, and emotional benefits with, finally, outside the sphere is the potential product, which is everything that could be developed in future for the product (Savage 2015: 43). Figure 4 demonstrates the total product concept model, with the different fashion products attributes associated with each level.

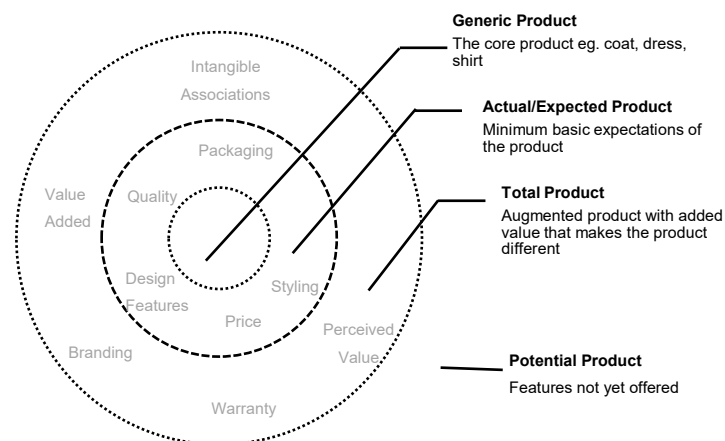


Figure 4: The Total Product Concept

Source: Savage (2015: 43)

It is vital to note the several segments within the fashion retail market, from luxury to high street and discounters (Bruce, Barnes and Daly 2006: 329). As declared, this study focused on retailing fashion design entrepreneurs, thus luxury and high street segments were the leading fashion retail segments of interest, along with the mass market fashion segment, therefore, the three main types of fashion design segments (Hamstech 2018).

Fashion products are associated with social values, as fashion is a fundamental medium that separates one time period from another and differentiates between social strata (Kuksov and Wang 2013: 51). Thus, the segmentation within the fashion retail market adds to the categorisation of product types, which distinguishes different fashion levels by excellence, quality and exclusivity. Those fashion levels are haute couture, ready-to-wear (Prêt-à-porter), mass production and basic/commodity fashion (Waddel 2009: ix; Štefko and Steffek 2018: 2). The fashion matrix differentiates fashion segments by price, quality, cost of production, style, service, and quantity customer base (Štefko and Steffek 2018: 3). Figure 5, illustrates the basic hierarchy of fashion, and the five levels that retailing fashion designer entrepreneurs dominate.

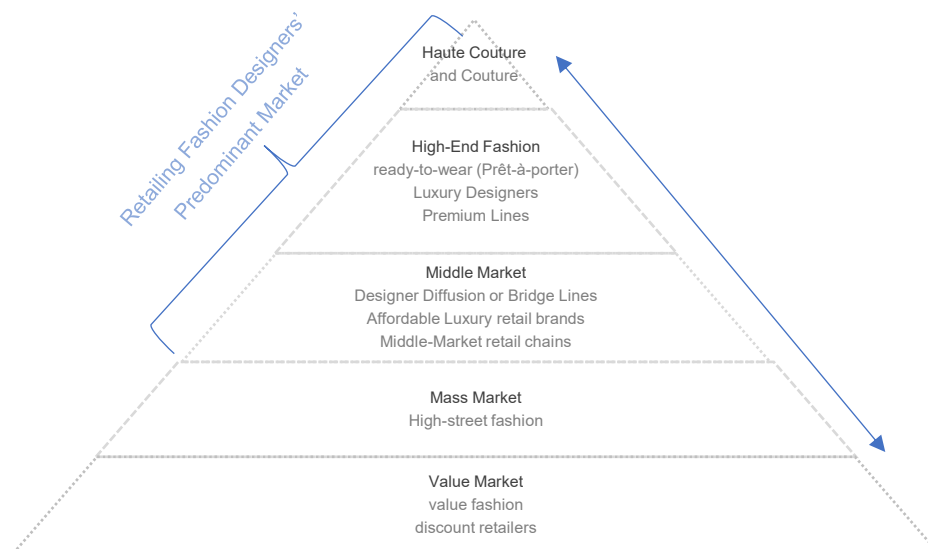


Figure 5: Hierarchy of Fashion Products

Source: Kotler (2015: 13)

At the top of the matrix is haute couture, the rarest practice of fashion design that originated in Paris and focused on exclusive [once-off], novel techniques that created challenges for fashion entrepreneurs navigating industry and art (Pouillard 2017: 356). Due to the difficulties created by haute couture's novelty and extreme exclusivity, there were changes during the 1950s with the design, production and marketing of clothing products for social classes, which caused the emergence of the ready-to-wear market, with appealing quality, instant availability and lower-priced products than the haute couture garments (Giulia 2017: 56). Subsequently, ready-to-wear is also referred to

as factory-made fashion products or prêt-à-porter, made according to customer demands (Pérez *et al.* 2020: 2). As ready-to-wear products are not custom made, the products are usually mass-produced, and products are made at all market levels, including high-end fashion, middle market, high street and value fashion (Posner 2015: 14). Essentially, haute couture serves the fashion imagination, and ready-to-wear brings the business into fashion, while prêt-à-couture combines the two fashion segments to create a form of high-end luxury (Ihring 2017).

High fashion products are categorised by seasons, with fashion brands releasing their new ranges at fashion weeks, which generally take place every six months (Kuksov and Wang 2013: 52). Closely associated with high fashion is luxury fashion products, with higher prices, superior quality, exclusivity and prestige (Quan and Shen 2017: 11-12). The middle market then caters to individuals who aim for in-between fashion products; high-end fashion designers usually introduce the middle-market products as diffusion or bridge lines (Posner 2015: 14). Mass products have developed as a sector of focus for fashion designers to gain market share, as the consumer markets changed in the twentieth century (López García 2014: 75-76). Fashion moved from low-cost, basics/commodity fashion to more fashion-conscious consumers who required quick turn-around products, decreasing the lifecycle of fashion products significantly over the past decades (Bhardwaj and Fairhurst 2010: 166-168).

Due to the increasing demand for mass-market fashion products with quick turn-around time, fast-fashion products gained momentum and popularity (Barnes and Lea-Greenwood 2010: 766). As innovation is vital in fast fashion, it is believed fashion designers should be afforded top priority within the fast-fashion supply chain (Li *et al.* 2020: 1). On the contrary, fast fashion is highly associated with larger retailers who aim to shrink their lead times and buying cycles to meet the increasing consumer demand (Fares, Lebbar and Sbihi 2018: 1). Fast fashion is, correspondingly, criticised for its negative sustainability impact, specifically on the environment, with a short practical and technical service life cycle of products, which may be easily disposed (Zamani, Sandin and Peters 2017: 1368). Over and above the environmental issues, fast fashion has been linked to unethical labour practices along the supply chain, as retailers procure their raw, semi-finished and finished materials from low-cost

emerging countries, compromising conditions because of the growing pressures of turn-around time (Turker and Altuntas 2014: 847).

In recent years, the importance of sustainability and ethical fashion has gained momentum, with consumers expecting more environmentally friendly and socially ethical fashion products (Pookulangara and Shephard 2013: 200). That has resulted in slow fashion being perceived as an antidote to fast fashion, as slow fashion represents a different business format that involves local production, traditional values, ecosystem preservation, and diversity of resources, as well as more responsible approaches (Štefko and Steffek 2018: 2). The main emphasis of slow fashion is quality, decreased consumption/production levels, as well as increased consciousness from producers [such as fashion designers] and consumers alike (Jung and Jin 2016b: 1).

Closely linked to slow fashion, are independent fashion designers that work with locally-focused strategies, reduced production speed, smaller quantities available in retail and higher quality, which then result in higher prices (Leslie, Brail and Hunt 2014: 236; Jung and Jin 2016a: 1). Slow fashion is important to fashion designers, as it helps consumers understand their fashion products, because it requires significantly lower intermediation between fashion designers, manufacturers and consumers due to the capitalisation of local culture and local resources (Jung and Jin 2016b: 3). With that in mind, the dimensions employed to identify consumer needs are dimensions identified as creating value for consumers who possess an orientation towards slow fashion (or fashion designers' products); those dimensions are authenticity, localism, exclusivity, and functionality, along with equity (Jung and Jin 2014: 514; Jung and Jin 2016b: 5; 2016a: 415).

Within the fashion industry, authenticity addresses attributes that embody the self-identity of consumers recognised through the brand appeal, the actual characters of the brand and the confidence the brand exudes (Kim and Sullivan 2019: 5). Previously, the authenticity of eco-friendly clothing was found to have a significant influence on the purchasing intentions of consumers (Hasan *et al.* 2022: 13). However, the factors used to measure the authenticity of eco-friendly clothing were more focused on organic cotton/textile and not necessarily on the full fashion product for consumers

who possess an orientation towards fashion designers' products, who are the focus of this research. Moreover, authenticity with quality and sincerity was used as a dimension to evaluate luxury consumption values and was found to inspire luxury brand purchases in India (Das, Jebarajakirthy and Sivapalan 2022: 12). Specifically, authenticity is deemed an essential factor for consumers between 30 and 70 years, who preferred to purchase fashion based on price and nostalgia, while investing more time, money and effort on their purchases (McColl *et al.* 2013: 145). Accordingly, this research deems authenticity as one of the essential factors when investigating critical fashion product characteristics.

Closely linked to authenticity is localism, which addresses the distinctiveness and uniqueness of an area due to the required local knowledge and adaptation (DeLong *et al.* 2013: 62). Localism has been fundamental in the fashion industry when considering the framework of sustainable product attributes, as it ensures economic decisions are community-based, with activities shaped by the vibrancy and intriguing resources of a place, ensuring long-term success (Fletcher and Grimstad Klepp 2018: 134). Moreover, localism is an essential factor when considering the circular economy of clothing products (Real, Earley and Goldsworthy 2018: 17). Since this research is focused on specific areas, Germany and South Africa, it is essential to evaluate the attitude of consumers towards locally produced fashion in these areas.

Encompassing authenticity and localism is exclusivity, as they are intrinsic cues that highlight unique products (closely related to fashion designer products), rarity, expert craftsmanship and artisanship (Bhaduri and Stanforth 2017: 179). On the one hand, exclusivity has been observed to be an essential factor, as it creates differentiation and allows premium pricing for retailers (McColl *et al.* 2013: 145). Researchers have observed retailing fashion design entrepreneurs work with limited production, creating scarcity and exclusivity linked to a status symbol (Bhaduri and Stanforth 2016: 474).

Functionality, on the other hand, evaluates how the lifespan and efficiency of a product are maximised (Blas Riesgo, Codina and Sádaba 2022: 5). This is an essential factor, as it examines consumers' orientation towards fashion products' longevity and versatility (Jung and Jin 2016a: 412). Some retailers, such as Uniqlo (owned by Japan's fast retailer), have argued that "consumers need functionality more than they

need fashion trends” and even attribute the retailer’s success to the functionality of their products (Tokatli 2020: 613). Nevertheless, specific geographic areas have been found to have differing results on consumers’ perception of slow fashion clothing; in Kazakhstan, for example, functionality influenced consumers’ perception of slow fashion, while in Turkey, functionality did not impact consumers’ perception of slow fashion (Şener, Bişkin and Kılınç 2019: 1555). This research, therefore, deemed it consequential to determine how different consumers in different geographical areas perceive functionality, as it is a factor that could, potentially, be the cornerstone of a business, such as Uniqlo, or be of absolutely no value, such as in Turkey.

Finally, equity is regarded as one of the important product attributes for slow fashion, since it addresses issues such as the deflation of prices due to the cheap manufacturing prices in “developing” countries, which focused the attention of consumers on unfair labour practices sometimes employed when producing or selling fashion products (Saicheua, Cooper and Knox 2011: 2). Accordingly, social equity is closely linked to localism, as it aims to measure how businesses are involved with the local community and relate to the labour market (Bhardwaj 2020: 262). Peters and Simaens (2020: 26) additionally advised the clothing industry should pay more attention to increasing consumer awareness of social and environmental issues within the clothing and textile industry to create a higher demand for sustainable products. Overall, social equity requires fairness (Sorinel 2010: 140), while fairness within the fashion industry is usually linked to fairtrade, which is closely linked to specialist retailers [such as fashion design entrepreneurs], product certification and quality labelling systems of products (Eberhardt *et al.* 2021: 56).

Empirical data on consumer behaviours and their direct impact on critical success factors are, ultimately, required to determine the actual consumer uptake of sustainable product attributes (referred to in this research as authenticity, locality, exclusivity, and functionality, as well as equity). There is also an opportunity to more thoroughly investigate the support of sustainable fashion products, the scalability of slow fashion across different markets, and the influence of regulatory frameworks of external support. This study addresses these gaps to provide a more comprehensive view of the potential of sustainable or slow fashion in South Africa and Germany. In addition to the five slow fashion product-related factors discussed (authenticity,

localism, exclusivity, and functionality, as well as equity), price was found to be another factor to consider (Blas Riesgo *et al.* 2022: 18), discussed next in detail.

2.2.3 Fashion Pricing

There is a perceived value to fashion products, which can be created through quality, aspirational products or price; still, independent fashion retailers were found to not be formulaic in their pricing approach (O'Hare *et al.* 2018: 378). Pricing directly affects fashion brands' profits, as incorrectly pricing garments can lead to unintentional market positioning, low-profit margins, and the inability of a business to break even (Sarma 2015).

Savage (2015: 45) stipulated that research related to pricing is imperative for retailers to understand "how customers perceived price, what customers consider as good value, how much customers are willing to pay for specific products, what customers will pay more for and how much competitors are charging." Pricing fashion retail products too low, not striking the correct balance between the variety of price points, not implementing the proper pricing strategy, and not communicating, as well as not presenting the prices appropriately to consumers, are some common pricing mistakes made by retailing fashion design entrepreneurs (Tsolova 2019).

Price significantly influences the hierarchy of fashion and affects how fashion products are positioned for a specific target market (Kovač, Palić and Tolić 2021: 24). Thus, pricing determines where a fashion brand is situated in the market, either with the luxury price-points, which involves products with a higher consumer value perception than actual production costs; or value-based price-points for the middle market, where value for money versus quality of products are weighed against each other; or budget pricing, which is solely based on affordability, usually linked to fast fashion and a market segment that is not brand loyal (Sarma 2015).

In order to categorise retailing fashion designers into their relevant price groups, businesses must understand pricing objectives associated with pricing strategies, which can vary considerably across industries (Faith and Agwu 2018: 89). Jung and Jin (2016b: 6) were able to consolidate pricing categories into one study, by hypothesising retailers that could create superior consumer value through various

pricing factors, could acquire a more competitive position in the market and consumers concerned about equity (fairness within the production process, which eventually impacts price), will perceive higher value towards fashion products. Therefore, this research had to understand the various pricing strategies, to later categorise consumers according to their relevant pricing groups.

Some fashion pricing strategies include wholesale, retail, and discounted price points, due to cost margins, actual expenditure, and consumer perception of the value of fashion products (Savage 2015: 45). Fashion brands utilise various methods to determine the price of a product. Sarma (2015) detailed three of those strategies: (i) the backward pricing method, where price estimations are based on the current market prices, which then determines the recommended retail price, after this, the suggested retail price is divided by four to estimate the ideal cost price; (ii) the keystone mark-up method (or cost-plus strategy) takes the cost price of the garment, multiplies this by two for the wholesale price, following which the wholesale price is multiplied by two or two-and-a-half to establish the retail price; (iii) the absorption of pricing method is a five-step method that starts with calculating the cost price by adding the cost of materials, trims and labour. The overheads, administration, and design expenses (determined by dividing the number of items produced in one style) are calculated. Finally, all the above-mentioned are added and multiplied by two or two-and-a-half for the actual retail price.

Chen (2020) highlighted additional pricing strategies, which include: (iv) the competitive or competitor-based pricing strategy, (v) the value-based pricing strategy, (vi) the penetration pricing strategy, (vii) the everyday low-price strategy, (viii) the skimming pricing strategy, (ix) the premium pricing strategy, (x) the bundle pricing strategy, (xi) the high-low pricing strategy or discount pricing, (xii) the psychological pricing strategy.

The competitor-based pricing strategy benchmarks price points according to competitors, to ensure the price points are neither too high nor too low, but just right, compared to those of the competitors. The competitor-based pricing strategy can, correspondingly, be based on pricing above or below competitors, dependent on the superiority or inferiority of the other retail mix elements. With the value-based pricing

strategy, consumer value perception of the brand and the demand fluctuation data determines the price (Bloomenthal 2020). Furthermore, penetration pricing strategy is suitable for the initial stages of building a brand, applying lower price points than anticipated to penetrate the market and attract new customers, as well as to launch new products or gain market share (Kenton 2021). The everyday low-price strategy (EDLP) then targets price-sensitive consumers; it is usually utilised by larger fashion retailers with a significant market share, more prominent brands or the institutional ability to consistently offer low prices without the pressure of promotional or sale prices (Wells 2020).

For more premium products, the skimming pricing strategy initially implements higher price points and then drops the price over time to attract other price-sensitive consumers as the demand of the initial (price-insensitive) consumer is satisfied, and competition starts to increase; as a result, this strategy is suitable for innovative, unique and new products (Hayes 2021). The premium pricing strategy, therefore, assumes consumers are willing to pay premium prices for the higher perceived value of the products due to brand awareness; thus, products are priced above the expected market price (Campbell 2020). In a league of its own, the psychological pricing strategy makes use of consumers' cognitive biases to price products favourably for the business; this strategy is grounded on the understanding that a human brain uses shortcuts to make decisions; as a result, 95 percent of consumers' buying decisions are made subconsciously, based on emotions and intangible goals (Baldwin 2020).

Wroblewski (2019) identified a total of five pricing strategies and four other pricing strategies, in addition to those already identified by Sarma and Chen. First, cost leader pricing strategy varies in price points, with some prices set below the cost price; in contrast, different price points are escalated for counterbalance and to turn a profit. Second, dynamic pricing strategy is based on consumers' tolerance, which results in prices fluctuating depending on seasons or specific periods. Third, the high-volume pricing strategy is based on consumers receiving discounts due to high-volume purchases. Last, product line pricing is based on predictability, prior consumer knowledge and experience when purchasing a specific type of product from particular retailers, meaning they will have a set expectancy of the product price range.

The more sophisticated fashion retailers are blending intuition with science, by implementing advanced analytics for pricing strategies, in order to gain an understanding of customers' perceived value and maintain insight into the impact of competitors' financial performance, while remaining agile to respond to changes (Gerards *et al.* 2018: 6). Nonetheless, the available advanced pricing analytics do encounter some problems, referred to as "black box", with difficulty understanding the math or algorithms, creating prices much higher or lower than market prices (BenMark *et al.* 2017: 2). Ultimately, fashion prices consider several direct and indirect costs, as well as perceived customer value, which result in higher price-points than fast-fashion retailers that are sometimes criticised for their hidden supply-chains, where the final retail price maths do not correlate with all the incurred costs (Farra 2020).

Unlike fast fashion, slow fashion prices are, furthermore, generally higher, as they are related to higher quality, timeless designs and smaller quantities (Jung and Jin 2016b: 4). Conversely, reasons behind consumers' willingness to pay price premiums have been linked to design and quality of products (Kovač *et al.* 2021). Accordingly, greater customer value towards slow fashion was found to increase consumer willingness to pay premium prices, and according to the customer creation framework, products with superior value acquire a more favourable position in the market (Jung and Jin 2016b: 6). Thus, consumers are more inclined to pay a premium when they perceive that brands uphold sustainable values, aligning higher pricing with enhanced brand responsibility (Kekkonen 2023: 2). However, a challenge with communication has been identified, as micro retailers needed to persuasively demonstrate the value of sustainable fashion to consumers, in order to increase buy-in from mainstream consumers (Henninger, Alevizou and Oates 2016: 410).

This connection between value, perception, communication and the willingness to pay price premiums, indicates it is important for brands to cultivate consumer trust and willingness to invest in higher-priced items. For instance, the introduction of bioplastics in the clothing industry has been found to influence consumer pricing tolerance, as the acceptance of higher prices is often conditional upon the sustainable attributes of the materials used (Shadkam 2023: 1). A less complicated justification for price premiums would be a positive online shopping experience that can notably enhance the perceived value of clothing items (Sun 2023: 208).

Conversely, it is important for retailers offering premium prices to safeguard the authenticity of their products, by considering the market dynamics accompanying the presence of replicas and first-copy products, as these complicate consumer perceptions of value (Anunay and Amala 2024: 1076). Generally, the willingness of consumers to pay premium prices can be shaped by a confluence of factors, including sustainability, perceived value, the impacts of e-commerce, and product authenticity. It is, therefore, imperative to determine whether consumers in South Africa and Germany recognise the value added to retailing fashion design entrepreneurs' product offerings to induce the willingness to pay price premiums.

Overall, this section highlights that it is imperative for retailing fashion design entrepreneurs to understand their pricing strategies and their consumers, in order to estimate the price elasticity of consumers (Faith and Agwu 2018: 90). Resultantly, this study evaluated consumers' willingness or unwillingness to pay premium prices for fashion designer products, associated with all the attributes of slow fashion.

2.2.4 Fashion Promotion

Promotional activities are all the communication methods and channels that provide consumers with information on the product, services or retailer, through the promotional mix of advertising, sales promotion, PR, and personal selling, as well as direct marketing (Kovač *et al.* 2021: 24). Retailers with smaller capacity, [such as fashion designers] usually utilise external companies to oversee their promotions, including advertising, demonstrations, fashion shows, and visual merchandising, along with campaigns, special appearances, formal productions, and institutional events, as well as general PR (Diamond *et al.* 2015: 280). However, it is essential to note the promotional actions listed are both B2C and business-to-business (B2B) activities, with this section's objective to determine the B2C activities, thereby moving towards the research objective of identifying whether fashion promotion impacts the patronage of consumers towards retailing fashion design entrepreneurs and whether it is something to be included in the guidelines and policies of external support.

With B2B retailing fashion designers need to engage in promotional activities with product developers, sourcing agents, contractors and retailers, and to achieve this,

they usually participate in promotional events such as fashion weeks, market weeks and trade shows, typically hosted in major market centres (Burns and Mullet 2020: 209). Fashion weeks are a regular feature within the industry and are used for PR and publicity for fashion designers as they showcase their ready-to-wear, prêt-à-couture, haute couture or seasonal ranges (Wanamaker 2015: 172). Fashion shows can range from very formal events with high budgets [and high luxury garments] to less formal events, such as fashion parades with lower budgets [and streetwear or basic/commodity fashion] (Diamond *et al.* 2015: 292).

While one fraction of retailing fashion designers relies on fashion weeks to promote their products, another relies primarily on trade shows to present their product lines (Burns and Mullet 2020: 209). The advantage of trade shows is that some retail buyers can view and compare various fashion designers' products simultaneously, at a closer range and for more extended periods than a fashion show (Savage 2015: 48). Market weeks are similar to fashion weeks but are more wholesale-focused than retail-focused, usually sponsored by wholesale merchandise marts or trade associations with a special focus on particular product categories (Burns and Mullet 2020: 209).

For B2C promotions, fashion advertising is used to raise awareness, provide brand information, persuade consumers regarding brand attributes, and encourage consumer interaction, as well as generate sales, reinforce the brand image, communicate the brand position, and construct consumer perception, in addition to creating aspirational messages, crafting desires, and generating consumer engagement and conversation (Wanamaker 2015: 174). Most advertising directed toward consumers is usually found in newspapers, magazines, lookbooks, and direct marketing, as well as television, radio, fashion retail websites and social media (Diamond *et al.* 2015: 279). Fashion advertising was previously viewed as essential in developing an appropriate retail mix to improve consumer involvement with fashion (O'Cass 2000: 555).

From emerging fashion designers to high-end fashion labels, the most prevalent form of promotion has been found to be social media (Ahmad, Salman and Ashiq 2015: 6). With the development of digital and social technologies, it has become increasingly important to understand the impact of these interactive promotional efforts on

consumers (Chu and Seock 2020: 93). Lately, independent fashion retailers have found social media to be the most successful medium of promotions and advertising, as they use it to create communities and inform their customers of new products (O'Hare *et al.* 2018: 381). In agreement, Aragoncillo and Orus (2018: 55) explored the impact of social networks on consumer buying behaviour and found social networks focused on sensory imagery (such as Facebook and Instagram), influenced and triggered purchases towards fashion. Moreover, small and medium-sized enterprises (SMEs) with websites and social media found social media had a more positive influence when entering international markets (Rienda, Ruiz-Fernández and Carey 2020: 135).

Unlike the traditional form of advertising, which is a one-way communication format from the brand to the consumer (Wanamaker 2015: 174), social media provides multiple tools for consumers to engage with fashion brands that understand the complexities of internal and external factors affecting consumers (Nash 2019: 26-27). Research has shown a direct link between the fashion industry and the use of social media across all demographics, connecting potential consumers to retailers (Ahmad *et al.* 2015: 6). Furthermore, social media has become a prevalent form of advertising that even large to medium-sized fashion retailers use to communicate their corporate social responsibility (CSR) efforts linked to sustainability (Kwon and Lee 2021: 700).

In the last two decades, there has been a merger between advertising and social media, called social advertising; used to create consumer patronage by using the two-way communication found through social media, to develop unique advertisements that meet consumer needs (Rehman and Al-Ghazali 2022). The fashion industry has been transforming, as far as social advertising is concerned, incorporating social advertising as a fundamental promotional activity (Ahmad *et al.* 2015: 6). The importance of social advertising has been attributed to the visual-centric component found both in fashion and social media platforms, where the business' visual brand identity and community network are crucial (Kwon and Lee 2021: 710).

As social media has been established as both the most powerful promotional tool for fashion businesses and the primary source of information for consumers (Chu and Seock 2020: 93), to identify consumer needs related to promotional efforts from

fashion design entrepreneurs, this study focused on social advertising and social media. Overall, encompassing all forms of fashion promotion covered in this section, social media and social advertising have managed to become the most diverse form of promotion for the fashion industry by incorporating promotional efforts, from live streaming of fashion events, to the main showcasing of fashion weeks, to social shopping (Ahmad *et al.* 2015: 1). Correspondingly, social advertising has been reviewed as highly impactful, authentic and more valuable than traditional advertising, by being established as the most likely medium to gain control of advertising efforts, thus enabling fashion brands to achieve desired results (Chu and Seock 2020: 93).

In this study it is, nonetheless, also recognised that not all consumers are active on social media, with only 59 percent of the world's population using social media (Chaffey 2023), thus, traditional advertising will also be considered a potentially critical promotional factor. Interestingly, traditional and social advertising have been found to work hand-in-hand and complement each other to build brands because, while traditional advertising creates awareness, consideration and enhances customer acquisition, social advertising, together with social media, spurs preferences, creates impressions and accounts for volume (De Vries, Gensler and Leeflang 2017: 2). It has been argued traditional advertising has significant drawbacks and difficulties in measuring the impact and effectiveness of campaigns, unlike digital advertising, where metrics such as click-through rates and engagement levels are readily available, traditional methods offer less transparency in tracking returns, complicating return on investment (ROI) calculations (Blakeman 2013: 102).

With the growth of digitalisation, however, traditional advertising has not been dominant in recent research and has previously been used to traditionally measure consumer involvement with fashion brands (O'Cass 2000: 572). The effectiveness of traditional advertising in reaching broad audiences is well-recognised, as it provides access to a wide demographic, including those in less digitally-connected regions (Blakeman 2013: 18). Additionally, traditional platforms such as television and print media are particularly effective in building brand awareness and trust, qualities that newer digital platforms struggle to match (De Vries *et al.* 2017: 2). This trust is further enhanced by the physicality and perceived permanence of traditional media, which for many consumers, signals reliability (O'Cass 2000: 570).

Though traditional advertising has been regarded as a great support for social advertising, it is important to consider the various costs associated with production and distribution of the different mediums (De Vries *et al.* 2017: 1 & 12), which can make it less accessible for smaller businesses [such as retailing fashion design entrepreneurs] or those with constrained budgets. In summary, while traditional advertising offers unparalleled reach and credibility, it must adapt to overcome challenges related to cost-efficiency, measurability, and customisation. The integration of traditional and digital advertising methods can leverage the strengths of each to achieve more effective marketing outcomes (Blakeman 2013: 16; De Vries *et al.* 2017: 1). As a result, both traditional and digital promotional mediums were considered in this study.

2.2.5 Fashion Presentation

Unlike place, which deals with the specific location, fashion presentation refers to the internal conditions of that store location, while fashion promotion denotes the external communication of the retailer (Adharin and Marsudi 2019: 129-130). Additionally, fashion presentation differs from fashion promotion, as it focuses on visual aesthetics and cues once the consumer is within the vicinity of the brand (Kusumasondjaja 2019: 18).

Fashion presentation is also referred to as physical evidence, where consumers can experience the brand offerings and ethos through tangible augmented elements (Mitterfellner 2020: 49). Those tangible augmented brand elements represent various features, and in this research, the focus was on visual merchandising, which incorporates store design and retail atmospherics (Varley and Trigoni 2019: 53). Additionally, visual merchandising involves exciting presentations and creative elements that capture consumers' attention, with or without the intention to pause and shop (Diamond *et al.* 2015: 147).

Visual merchandising is an extensive topic, also categorised under promotions and brand positioning, by fostering the consumer's relationship with the brand through 'brandsapes', a space created to provide intense experiences with consistent messages that meet expectations (Roncha 2019: 122). Moreover, visual

merchandising incorporates communication cues such as shop window displays, interior merchandising, signage, and graphics, as well as mannequins, lighting, colour, and materials, along with props (Diamond *et al.* 2015: 150-153). Anić, Mihić and Kursan Milaković (2018: 553; 555) summarised these attributes as store interior, window display and in-store display and found a link between consumer innovativeness, consumer response towards brands and visual merchandising.

The in-store environment is imperative in creating customer loyalty, as it can trigger unplanned interactions within the store (Terblanche 2017: 1). With a carefully constructed retail environment, customers can explore the totality of the store and engage in the complete retail experience, resulting in consumers spending more time in the retail store (Htwe 2020: 62). Perumal *et al.* (2020: 136) summarised the importance of store design through one of their case studies, which established store design was not only used to make a store appear aesthetically pleasing, but also facilitated the operational strategies, which optimised sales, circulated in-store traffic, maximised floor space through meticulous store layouts, and enhanced the store image with a cheerful store ambience, in addition to guaranteed store practicality and ease of navigation, through carefully considered fixtures and checkout points.

Retail atmospherics is, however, less operational and focuses on enriching consumers' shopping experience through nonverbal communication, eliciting a positive shopping response (Foster and McLelland 2015: 196). There are various retail atmospheric indicators such as store convenience, store maintenance, neatness of the store arrangement, and consideration of amenities, as well as consumers need, and temperature and lighting (Adharin and Marsudi 2019: 129). Kumar, Garg and Rahman (2010: 3) illustrated that the influence of retail atmospheric stimulus on consumers was firstly due to atmospheric cues such as colour, lighting, music, and crowding, in addition to design, layout, olfactory factors and tactile factors, which influenced consumers' cognitive process, store image and customer values concerning purchase intention, patronage intention, shopping satisfaction and positive word-of-mouth.

In addition, retail atmospherics has progressed to incorporate e-atmospherics, which impacts online consumer behaviour, as would offline atmospherics, with technologies

such as interactive terminals, augmented realities, smartphone applications, and cross-channel marketing physical atmospherics with e-atmospherics (Poncin and Ben Mimoun 2014: 851). Essentially, elements that create e-atmospherics are technical features, layout design and social interactivity (Mimoun 2013: 45). It should also be considered that e-atmospheric features are influenced by technological developments, accelerated due to digitalisation and frontier technologies such as artificial technologies (AI), the internet of things (IoT), big data, and blockchain, along with 3D printing, robotics, drones gene editing, and 5G, nanotechnology, as well as solar PV (UNCTAD 2021). For example, retailers have been experimenting with mechanisms to provide the smell of products to consumers, using particular computer nodes or experimenting with avatars, virtual trial rooms and even drones, to create additional e-atmospherics (Bhattacharya, Mishra and Mishra 2015: 261).

It has recently become almost mandatory for retailers to operate online since the COVID-19 pandemic. The biggest challenge for brands is managing identity and image across channels to provide closely related in-store experiences as online store experiences (Roncha 2019: 122). Similar to how in-store visual merchandising requires communication cues, so does online visual merchandising. Those cues include pictorial presentation of products, customisation of consumer experiences, product information and general web store environment, with backgrounds, signage, colour and other atmospheric features (Jakhar *et al.* 2020: 2769).

It is important to note, within the fashion industry, visual merchandising is considered the most critical factor of presentation, as consumers were found to be influenced by all visual merchandising elements when making purchases (Gudonavičienė and Alijošienė 2015: 639; Basu, Paul and Singh 2022: 397). Furthermore, speciality stores' visual merchandising has been previously proven to enhance consumers' impulse buying behaviour through window and mannequin displays (Iberahim *et al.* 2020: 16). Over and above influencing consumers' purchasing behaviour, fashion retailers use visual merchandising to increase foot flow (Soomro, Kaimkhani and Iqbal 2017: 34). Correspondingly, visual merchandising has been proven to play a crucial role for consumers' online stores' selection, by fulfilling sensory requirements through pictorial presentations and the number of product images (Jakhar *et al.* 2020: 2777). Overall, visual merchandising is the prevailing presentation method in fashion, known to

enhance the competitiveness of online and brick-and-mortar channels (Choo and Yoon 2015: 1).

With that in mind, it is important to consider how consumers interact with the visual merchandising of fashion designers to determine whether that encourages them to patronise their offerings, to the point where presentation should be regarded as a critical success factor for retailing fashion design entrepreneurs, and be prioritised in external support policy-guidelines and framework. However, it is important to note, visual merchandising is only effective when product, price and place are effectively executed, as creativity alone cannot sell merchandise consumers are not interested in (Easy 2009: 231).

2.2.6 Fashion Personnel

The primary function of retail is to interact with people, making fashion retail personnel the driving force, which results in the need for retail brands to invest in the training and the well-being of their personnel (Htwe 2020: 62). This is important, as personal interaction with frontline personnel has been recognised as a source of generating consumer trust, specifically with using new technologies online and on-site (Riquelme and Román 2014; Lee 2017: 214). Frontline personnel deal with the most face-to-face interactions with consumers that require personal attention, readiness to help, politeness and punctual service (Terblanche 2017: 2). Hence, consumers' need for interaction with frontline personnel should be considered as a valid variable to segment the market, predict consumer behaviour and patronage patterns (Riquelme and Román 2014: 147; Celuch, Robinson and Walsh 2015: 284; Lee 2017: 223). According to this research, it is crucial to evaluate the consumer interaction with frontline staff, as this involves the need for frontline staff to possess interpersonal skills that support authentic social bonds, which can potentially generate consumer trust, as the company demonstrates respect and value towards the consumer (Celuch *et al.* 2015: 288).

Personal interaction has additionally been researched in connection to omnichannel retailing, evaluating how service personnel treat consumers, whether through direct face-to-face encounters or indirect interactions (Zhang *et al.* 2019: 217). Likewise, personnel are essential contributors to seamless customer experiences within the

omnichannel process (Peltola, Vainio and Nieminen 2015: 340). It has, on the one hand, been argued that fashion personnel are crucial to facilitating and providing human interactions in the omnichannel retail format, also referred to as “phygital”, as that will create rapport and engagement, which would, in turn, strengthen commitment, trust and enhance consumer experience (Pangarkar *et al.* 2022: 1). On the other hand, the complexities imposed by the omnichannel format, requires retailers to outsource or hire personnel with varied educational backgrounds, levels of training and experiences (Berman and Thelen 2018: 611). This means, should personal interaction be identified as a critical success factor (specifically for omnichannel strategies), retailing fashion design entrepreneurs would be required to hire personnel with varied educational background levels and training experience, and external support organisations would need to prioritise personnel support in their policy-guidelines and framework.

To acquire the varied and relevant personnel, some specialised services required are from personnel managers or administrators in charge of recruitment, selection, training, and salary administration, as well as industrial relations of businesses (Rotich 2015: 59). The personnel manager or administrator function initially involved transactional activities, but was later developed and named human resource management (HRM), intended to explore effective organisational processes and business activities that could potentially benefit employee engagement, commitment and trust (Lee 2021: 238). The core purpose of HRM is to create value in businesses through employee strategic management, which includes activities including: human resource (HR) policy drafting, planning, information management systems, knowledge management, such as ethics, governance, CSR, analytics, evaluations, recruitment, diversity management, career management, training, development, counselling, discipline, termination of employment, performance quality management, remuneration, benefits, industrial relations management, financial management for employees and occupational health/safety (Rotich 2015: 58, 70).

In addition to interpersonal skills and service readiness, the alignment of employee behaviour with the retail brand has emerged as a critical success factor. This is captured in the concept of Brand Orientation (BO), which positions the brand as the central strategic focus of the business (Schmidt *et al.* 2016: 1). Internal Brand

Orientation (IBO), a subset of BO, emphasises the importance of employees internalising brand values and acting in ways that reinforce brand identity (Wiid, Cant and Senooane 2025: 15). In omnichannel retailing, where brand experience spans physical and digital touchpoints, personnel must consistently embody brand attributes to ensure seamless and authentic consumer engagement. Empirical studies in South Africa have shown that brand-oriented behaviour among staff contributes significantly to market performance, even in resource-constrained environments (Schmidt *et al.* 2017: 216). Therefore, fashion design entrepreneurs must not only recruit skilled personnel but also cultivate brand-aligned cultures through training, internal communication, and strategic HRM practices.

Strategic HRM was developed to demonstrate the importance and impact of HRM activities in organisational performance, in order to explore a more macro perspective of the business environment (Delery and Doty 1996: 802). By definition, strategic-HRM involves the plans and intentions of an organisation to achieve its goals through personnel (Armstrong 2021: 29). HR strategies are drawn through the analysis of economic conditions, as well as knowledge of the industry structure regarding competencies required for long-term competitive advantage (Lee 2021: 237). The overall HR strategy can be summarised as the combination of the resourcing strategy, HR development strategy, reward strategy and employee relations strategy; together, these strategies are influenced by the external and internal environment, which also makes up the business strategy (Armstrong 2021: 36).

Uyar and Deniz (2012: 922) conducted a study researching the perceptions of entrepreneurs on strategic HRM and found entrepreneurs had a positive attitude towards HRM; however, they lacked the aptitude for it. As a result, Uyar and Deniz recommended state and private programmes be implemented to support entrepreneurs in practising proper management strategies, improving their ability to operate unique human assets effectively. Personnel acquisition, retention and development have been identified as HR practices that lead to successful entrepreneurship (Narula and Chaudhary 2018: 70).

While formal HRM support programmes have been recommended to enhance entrepreneurial capacity, the implementation of such systems often encounters

practical limitations. Entrepreneurs frequently face resource constraints in acquiring, retaining, and developing formal HR systems; hence, entrepreneurial ecosystems have been recommended as one solution entrepreneurs can use to leverage informal, inter-organisational talent management systems (Roundy and Burke-Smalley 2021: 1). The bases of this concept are ecosystems, which are “The union of localized cultural outlooks, social networks, investment capital, universities, and active economic policies that create environments supportive of innovation-based ventures” (Spigel 2017: 49). Interestingly, three clusters of entrepreneurial ecosystem elements were found particularly strongly interdependent; talent, entrepreneurial culture and support services (Stam and Van De Ven 2021: 827), indicating the importance of support for entrepreneurs in this area.

2.3 THEORETICAL FRAMEWORK

This section provides the theoretical framework outlining the constructs discussed in this chapter, for the quantitative indicators that will measure the critical success factors of retailing fashion design entrepreneurs with consumers. The theoretical framework, therefore, offers a guide on how to build the operationalisation that supports this entire research, based on the selected theories discussed (Grant and Osanloo 2014: 13).

The quantitative theoretical framework outlined, therefore, serves as an analytical tool in this study, delineating the relationships between various constructs that define consumer behaviour and decision-making processes in the fashion retail industry, based on the retail mix. The framework presents several key variables derived from the literature review, including: omnichannel perceived usefulness, omnichannel shopping intention, omnichannel patronage intention, authenticity, functionality, localism, exclusivity, equity, willingness to pay price premium, traditional advertising, social media platforms, social advertising, visual merchandising, e-atmospherics and needs for personal interaction.

Each construct within the framework will be operationalised using specific variables that can be quantitatively measured. For instance, place will be operationalised using omnichannel perceived usefulness, shopping intention and patronage intention (Mosquera *et al.* 2019; Ryu 2019; Banik 2021), while product will be assessed through slow fashion attributes such as authenticity, functionality, localism, exclusivity and

equity with price assessed by the willingness of consumers to pay price premiums (Jung and Jin 2014; Jung and Jin 2016b, 2016a); promotion will be evaluated through the influence of traditional advertising, social media platforms and social advertising (Tran 2017; Aragoncillo and Orus 2018; Rehman and Al-Ghazali 2022); while presentation will be operationalised through visual merchandising and e-atmospherics (Anić *et al.* 2018), and finally, personnel will be measured through the need of personal interaction when in a retail store (Riquelme and Román 2014).

This operationalisation ensures each theoretical concept is anchored in empirical evidence, allowing for measurable and testable hypotheses, discussed further in chapters 4 and 5. Finally, it is important to note that the natural selection theory guides this framework, as the study acknowledges that consumer preferences and retail strategies are not static, but that they evolve, compete, and adapt over time. This evolutionary perspective reinforces the importance of agility, relevance, and differentiation for fashion design entrepreneurs operating in complex omnichannel environments with the need for adaptative support structures.

Table 2.1: Quantitative Theoretical Framework with Consumers

6Ps	Constructs/Variables	Description	Operationalised Sources
Place	Perceived Usefulness	The appeal of performing the shopping task.	Mosquera <i>et al.</i> (2019)
	Omnichannel Shopping Intention	Purchasing intention towards different shopping channels a retailer offers.	Ryu (2019:18)
	Patronage Intention	Commitment towards omnichannel retailers.	Banik (2021:6)
Product	Authenticity	Unique and artisan craftsmanship and garment construction.	Jung and Jin (2014; 2016b; 2016a)
	Functionality	Maximisation of the utility of fashion products.	
	Localism	The element of local venues and resources used to produce fashion products.	
	Exclusivity	How fashion products are differentiated due to the level of heterogeneousness.	
	Equity	Fair labour practices employed when producing or selling fashion products.	
Pricing	Willingness to Pay Price Premium	Additional costs consumers intend to pay for fashion designer products.	Jung and Jin (2016)
Promotion	Traditional Advertising	Aspirational brand messaging communicated in different media formats.	Tran (2017); O'Cass (2000)
	Social Media Platforms	Online platforms creating social interactions and communities.	Aragoncillo and Orus (2018)
	Social Advertising	Promotion of a business through social networking sites.	Rehman and Al-Ghazali (2022)
Presentation	Visual Merchandising	Store displays, elements and enhancements that motivate consumers to buy, enrich the experience and facilitate operational strategies.	Anić <i>et al.</i> (2018)
	E-Atmospherics	Online atmospherics and visuals of online stores.	
Personnel	Personal Interaction	Need for personal contact for consumers in the retail context.	Riquelme and Román (2014)

2.4 CHAPTER SUMMARY

This chapter provided theoretical grounding for the study by introducing natural selection theory and the retail mix framework. Natural selection theory contextualised the success of fashion design entrepreneurs as shaped by external support and consumer preferences for specific retail traits.

These traits were then aligned with the retail mix, beginning with place, where omnichannel retailing emerged as a key format driving consumer patronage. Its relevance was attributed to mobile and digital technologies that enable simultaneous shopping across physical and online channels (Ryu 2019: 15 & 16; Alexander and Cano 2019: 218).

The chapter also examined fashion products, focusing on luxury, high street, and mass-market segments, and positioned fashion design entrepreneurs within the slow fashion movement, characterised by localised strategies, reduced production speed, and premium pricing (Leslie *et al.* 2014: 236; Jung and Jin 2016a: 1).

Pricing strategies were discussed as a means to categorise consumers based on their willingness to pay for designer products, offering insight into perceived value (Jung and Jin 2016b: 6). Promotion was explored through both social media and traditional advertising, acknowledging the dominance of digital platforms while considering the continued relevance of conventional methods (Chu and Seock 2020:93; O'Cass 2000: 555).

The chapter further addressed fashion presentation, including visual merchandising and e-atmospherics, and concluded with a review of fashion personnel, focusing on consumer interaction across omnichannel touchpoints (Terblanche 2017: 2; Zhang *et al.* 2019: 217).

It is important to note topics related to fashion design entrepreneurs, fashion retail or the fashion industry, are predominantly exploratory, as the field is under-researched. Consequently, the recent fashion-related literature available to operationalise this chapter is limited to what has been covered in this section, proving a significant gap with the research topic. Chapter 3 will examine the specific industry context, exploring how these theories apply to the practical realities of fashion design entrepreneurship in the diverse markets of South Africa and Germany.

CHAPTER THREE: FASHION INDUSTRY CONTEXT

The previous chapter provided a comprehensive review of the theoretical foundation of this study, which is the natural selection theory and retail mix. This chapter outlines the different aspects that impact entrepreneurship and provides a context of the fashion industry. The trade area mix will be the guiding framework for this chapter, as it addresses topics related to the trade area geography (TAG), trade area demand (TAD), and trade area heterogeneity (TAH). The fashion entrepreneurship section and the TAD section will address objective two, which explored the current literature and consumer aspects impacting the success factors of retailing fashion design entrepreneurs. TAG will cover the third objective, by defining the type of external support currently documented in Germany and South Africa. Ultimately, this chapter serves as the grounded theory guiding the qualitative study results. This approach, combining the retail mix framework from chapter 2 and the trade area mix framework results in the retail strategy matrix (Rosenbloom 1976: 58), were the overall guiding study theory. Figure 6 illustrates the chapter structure.

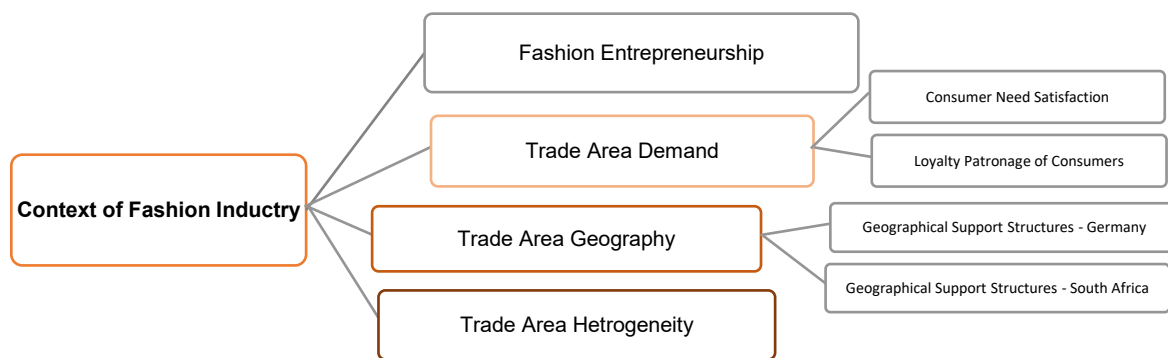


Figure 6: Chapter 3 Outline

Source: Developed by Author

3.1 FASHION DESIGN ENTREPRENEURSHIP

This section specifically focuses on objective two, outlining the critical success factors for retailing fashion entrepreneurs and providing the context, characteristics, and dynamics of fashion design entrepreneurs; these factors are essential for

understanding the needs of fashion design entrepreneurs and form the basis for proposing external support guidelines and framework. In simple terms, fashion is defined as a particular style that gains popularity during a specific period (Sarpong, Howard and Osei-Ntiri 2012: 97). It basically refers to dress, appearance and style (Rocamora and Smelik 2016: 2). Fashion has been viewed as a paradox, acting as a means of imitation, fostering social equality, yet, it distinguishes between different periods and social classes, bringing together various social groups, while simultaneously setting them apart (Simmel 1957: 541). This paradoxical system of fashion links to beauty and style, representing desirable objects and respectable glamorous practices, while simultaneously representing deceitful and explorative practices (Barnard 2013: 2, 4). The interrogation of fashion revealed its ability to guide key social and political practices, such as consumption practices, production and identity politics (Rocamora and Smelik 2016: 1).

Defining fashion is a complex and multifaceted concept explored from various perspectives. From a sociological perspective, fashion intersects collective and individual identities, patterns of production and consumption, as well as mechanisms of social differentiation and imitation (Aspers and Godart 2013: 172). Closely related to the sociological perspective, is the communicative and political point of view, exploring fashion through concepts such as culture, significance, social class, and gender, as well as reproduction, and resistance to challenging identities (Barnard 2013). From a decolonial perspective, fashion with its unique language, has been identified as a discourse for political and cultural-defying stories (Berkhout Garcia 2023: 6). Moreso, with decolonial discourse, fashion is observed as a verb, a medium of fashioning the body in its temporality in all geographical areas (acknowledging the different ways of life and perspectives) and operating beyond colonial definitions, which identify fashion as a noun incorporating contemporary systems within a capitalistic industry with modernity and coloniality (Jansen 2020: 1-4).

Fashion is commonly linked to style and clothing, which include utilitarian functions such as shielding individuals from environmental elements and preserving modesty (Barnard 2013: 5). Basically, fashion, with clothing as its major component, is considered to mean styles following prevailing trends (Goworek *et al.* 2020: 1). Mostly, fashion is meant to answer questions linked to utilitarian issues, society's attitudes and

behaviour, the spirit of the times “zeitgeist”, and semiotics, in addition to hierarchical and/or competitive signs, market economies and design (Carbonaro and Votava 2009: 31).

Simmel (2020: 93), incorporating all the fashion concepts, summarised its definition as follows:

“Fashion is the imitation of a given example and satisfies the demand for social adaptation; it leads the individual upon the road which all travel, it furnishes a general condition, which resolves the conduct of every individual into a mere example. At the same time it satisfies in no less degree the need of differentiation, the tendency towards dissimilarity, the desire for change and contrast, on the one hand, by a constant change of contents, which gives to the fashion of today an individual stamp as opposed to that of yesterday and of tomorrow, on the other hand, because fashions differ for different classes – the fashions of the upper stratum of society are never identical with those of the lower; in fact, they are abandoned by the former as soon as the latter prepares to appropriate them. Thus, fashion represents nothing more than one of the many forms of life by the aid of which we seek to combine in uniform spheres of activity the tendency towards social equalization with the desire for individual differentiation and change.”

Though fashion is a dynamic construct, this study recognises its role as a commercial industry, selling material goods with a socio-cultural significance, intertwined with modernity and post-modernity, involving tangible and intangible elements, individuals, and collective actions; all interconnected through processes of production, consumption, distribution, and representation (Rocamora and Smelik 2016: 2). The fashion industry role players recognised in this context are fashion designers, creatives who merge artistic endeavours with enterprise determination, making it imperative to understand business and the broader environment in which they operate (Malem 2008: 399). Fashion designers' roles include identity building, storytelling, and innovating, as well as being active agents and active community members (Chun, Gurova and Niinimäki 2017: 4477). Moreover, design in this context, is regarded as a highly sensitive seismograph of socio-cultural differences [between South Africa and

Germany] and a stimulus for cultural transformation (Carbonaro and Votava 2009: 42), specifically for external support structures.

At the core, creativity and fashion are interlinked with fashion design entrepreneurs, which means they must also be very aware of the industrial and commercial factors (Malem 2008: 403). To function effectively in this spectrum, fashion design entrepreneurs require a significant capacity for innovation, both in product design and business strategy, this includes mastering branding and marketing techniques that resonate well with their target audiences (Aakko and Niinimäki 2018: 354). Distinctly, fashion design entrepreneurs differ from other retail entrepreneurs, as they merge artistic talent with business acumen. This unique combination of creative involvement in design, artistic value, and proficient management of branding, marketing, and retail operations, places them distinctively at the intersection of creativity and commerce (Min and Wilson 2019: 35).

Entrepreneurship has been integral to fashion designers in the retail sector throughout history, since entrepreneurs introduced and drove ideas that enhanced (and continue to enhance) innovation within the retailing functions (Anitsal and Anitsal 2011: 1). On the one hand, the proliferation of new retail outlets, such as showrooms, fashion design markets and highly conceptualised online stores, are some ideas driven by entrepreneurs, specifically fashion designers (Gurova and Morozova 2018: 705). On the other hand, since 2008, the employment of graduates within the industry decreased exponentially due to the global economy's downturn (Lang and Liu 2019: 235). Therefore, entrepreneurship has become increasingly crucial for the economy, employment status and innovation in retail.

Entrepreneurship, in its broadest sense, refers to the process of identifying opportunities, mobilising resources, and creating value through innovation and enterprise (Brockhaus 1980: 509; Gartner 1988: 11). In the recent years, entrepreneurship has become even more dynamic, involving opportunity recognition, resource recombination, and innovation under uncertainty (Elia, Greco and Passiante 2020: 1). This shift from static definitions to process-oriented views reflects the evolving nature of entrepreneurship, particularly in creative industries where value creation is not only economic but also cultural and symbolic.

Entrepreneurs are increasingly recognised not merely as business owners but as agents of change, whose activities contribute to social transformation, employment generation, and market diversification (Morris, Kuratko and Cornwall 2013: 15). In this regard, fashion design entrepreneurs embody a hybrid identity, merging artistic creativity with commercial viability. Their entrepreneurial activities extend beyond product creation to include idea generation, development, and validation from the market (Prince, Chapman and Cassey 2021: 38).

Within emerging economies such as South Africa, fashion entrepreneurship plays a pivotal role in stimulating local economic development, fostering youth employment, and promoting cultural exports (Gatawa and Snowball 2024: 1). The retail - clothing, textile, footwear and leather (R-CTFL) cluster 2030 masterplan has recognised the importance of entrepreneurs in this cluster, and have committed to yield significant increase in local manufacturing, with local purchases expected to increase by R35 billion, representing real a growth in the sector of 5.5% per annum; with employment in the value chain increasing by 121 016 (from 212 416 to 333 162 jobs), while manufacturing jobs are expected to account for 73 549 of this (The Department of Trade Industry and Competition - the dtic 2020). This commitment from R-CTFL indicates that South African fashion designers as entrepreneurs are not only central to the revitalisation of local manufacturing, but also positioned as key drivers of inclusive industrial growth, cultural innovation, and employment creation within the broader value chain.

Berglann *et al.* (2011: 180) observed there was no consensus when defining entrepreneurship in general literature, then went on to distinguish entrepreneurship as the multiple roles of employing both human capital and financial capital in the functions of an entity. While Ünay and Zehir (2012: 316) presented the concept of employer/business owner, they alliterated that entrepreneurs are the administrative managers of a going concern and producers/innovators of ideas. To iterate the appropriate definition for this study, entrepreneurship is deemed as self-employment entities in the form of a sole proprietorship, partly self-owned, limited liability companies and partnerships (Berglann *et al.* 2011: 181-182).

Fashion entrepreneurs have been previously recognised as individuals who sold fashion products such as shoes, accessories, wedding or event outfits and other fashion-related products (Burke 2008: 12). Nonetheless, this may be considered a limited definition, as it does not consider either personal or business traits of the entrepreneurs (Aakko and Niinimäki 2018: 356). Later, Fernandes (2019: 1 & 2) concluded the definition of fashion entrepreneurship was limited and denoted it did not constitute full entrepreneurship, by virtue of individuals creating a business within the fashion industry. Furthermore, one of the functions identified for fashion design entrepreneurs is as companies, associations or individuals involved in the clothing business, with the primary focus on design, and some level of managing the manufacturing processes to either establish fashion labels, lifestyle clothing, niche market brands or emerging new designers (Kusumsiri and Jayawardane 2013: 67).

Fashion design entrepreneurship has rapidly evolved over the past few years, influenced significantly by digital innovation, changing consumer expectations, and a growing emphasis on sustainability. In recent years, it has become evident fashion design entrepreneurs are not only designers but also pivotal players in driving the industry towards a more ethical and technologically integrated future. For instance, research by Pasricha and Greeninger (2018: 1) demonstrates augmented reality (AR) has enabled fashion retailers to offer virtual try-ons, significantly enhancing the online shopping experience and reducing return rates. AR not only resolves sizing issues but also enhances the overall buying experience by making it interactive and personalised (Gour *et al.* 2023: 437). Similarly, 3D printing has emerged as a powerful tool, as this technology allows for the creation of tailor-made items in a cost-effective, environmentally friendly manner, producing custom-fitted and unique designs, by reducing waste and inventory costs and aligning with modern sustainable practices in fashion (Baytar, Chung and Shin 2020: 667).

It is important to note cultural influences continue to play a crucial role in shaping fashion design entrepreneurship. The cross-cultural exchange facilitated by global digital connectivity has allowed fashion design entrepreneurs to draw inspiration from a diverse tapestry of traditions, aesthetics, and consumer preferences (Bertola *et al.* 2016; Dan-Dan and Zhi-Qiang 2017: 159-161; Faerm 2019: 108; Min and Wilson 2019: 35). This enriches the fashion landscape, enabling designers to create more

inclusive and diverse clothing lines that appeal to a broader audience, as fashion designers use traditional cultural symbols in fashion design, effectively bridging global cultural gaps through creative expression (Zou and Joneurairatana 2020: 1). Nevertheless, with fashion brands expanding internationally, they face the challenge of appealing to global consumer trends, while respecting local cultural identities, which require a delicate balance that adeptly integrates all aspects of local cultural elements into globally appealing designs, fostering a deeper connection with diverse consumer bases (Cambridge 2016: 39). While cross-cultural influences generally enrich the fashion industry, they also present challenges related to consumer ethnocentrism, which has been argued to affect the acceptance of foreign fashion brands in local markets, suggesting fashion design entrepreneurs can mitigate these challenges through localised marketing strategies that emphasise the global quality standards of their products, while highlighting the unique cultural elements they embody (Radclyffe-Thomas *et al.* 2016: 243).

On the whole, the multidimensional subject of entrepreneurship has gained significant global research traction. Still, after evaluating the academic research available, there is a need for more focused studies targeted towards the development of entrepreneurs in specified fields, such as the fashion retail industry. Overall, this study recognises retailing fashion design entrepreneurs operate within the complicated construct of fashion, design and entrepreneurship, which coexists in ambiguity and in various forms, which do not require to be separated or elected but rather, acknowledged in its diversity.

Critical Success Factors of Entrepreneurs

Rockart (1979: 85) initially underlined the importance of critical success factors and defined those factors as the limited areas of a business in which satisfactory outcomes result in the successful competitive performance of the company; they distinctively explained that critical success factors are “a few key areas, where things must go right for the business to flourish”. Ten years later, Forster and Rockart (1989: 18) annotated a large number of papers and found, in summary, critical success factors can be used to determine management information needs, information system planning, strategic planning and implementation, as well as executive information systems and project/programme management, amongst other uses.

It was previously found most fashion design entrepreneurs strive for innovation, differentiation and appeal to achieve industry and commercial success (Ünay and Zehir 2012: 315). Innovative entrepreneurship is essential for producing high-performing firms in the fashion industry, which requires a high level of creativity not only in product design but also in business operations and market strategies (Ünay and Zehir 2012: 316). Similarly, Davis (2010: 6533) discusses the integration of design thinking into business models as a strategic approach to innovation, highlighting its significance in aligning product development with strategic business objectives. However, the basis of this study was to prove there is much more to a fashion design entrepreneur's success than differentiated and innovative aesthetics. Essentially, innovation cannot exist in solace, as business models are a fundamental approach to realise innovations for sustainability, emphasising the integration of economic, environmental, and social performance (Evans *et al.* 2017: 598). Additionally, 'ecologies' have been important for understanding and improving sustainable business models that address societal and environmental needs through innovative practices (Bocken, Boons and Baldassarre 2019: 2).

Success is believed to depend on multiple critical business functions, such as marketing and finance, as well as the involvement of industrial partners (Ünay and Zehir 2012: 318). Marketing management is a business function that directly influences market entry success, mediated by new product development and business networks, and while marketing's direct impact is profound, its effectiveness is enhanced by strong product development and strategic networking (Wang and Lestari 2013: 2444). Nonetheless, the marketing efforts would be futile without robust financial management, as effective financial strategies enable companies to manage inventory and supply chain uncertainties, secure expansion funding, and make strategic investments (Bhambani 2023: 2974).

These critical success factors were, however, found unattainable without industrial partnerships providing access to external expertise and technology, thereby driving innovation, improving production processes, enhancing market reach and competitiveness that support both marketing initiatives and financial stability (Grundey and Daugélaitė 2009: 118). This approach does not merely concern functional

alignment, it also involves creating synergies that enhance overall business resilience and success. This integrative view is supported by Naudé and Sutton-Brady (2019: 27-35), who discussed the strategic value of relationships and networks in business marketing and how these elements contribute to long-term success.

The seminal work of Ibrahim and Goodwin (1986: 45) described four significant areas contributing to the success of small business entrepreneurs, which are entrepreneurs' attributes, management skills, interpersonal skills, and environmental values. In agreement, Astuti, Supanto and Supriadi (2019: 160) focused on the relationship between management skills and the performance of SMEs and found personal maturity and managerial skills have a major influence on business performance. In terms of environmental values, its effect on entrepreneurial success has been widely acknowledged, with environmental factors such as market access and the socio-economic landscape possessing the ability to facilitate or hinder entrepreneurial success significantly (Saleem 2012: 24). Conversely, where interpersonal skills are concerned, this study does recognise that strong interpersonal skills, such as leadership and communication, are vital for entrepreneurial success, if only they are strongly influenced by business management education (JyothiSreedhar *et al.* 2023: 2).

Identifying a vast range of success factors of small businesses and entrepreneurs, Watson, Hogarth-Scott and Wilson (1998: 219) drew a vital framework that purported factors including: experience, socioeconomic background, skills and knowledge, personality attributes, traits, values, expectations, industry sector/business format, labour, technology, financial base, strategies and plans, management, resources, competitors, consumers, suppliers, geographic, demographic, banks, lifestyle or consumption patterns, government, organisational characteristics, support agencies and purchase behaviour. Accordingly, those factors were divided into two: the internal environment, which was the founder's and business's characteristics, and the external environment, comprising the business infrastructure and the business customer, with the latter being the primary focus of this study, while some internal attributes such as business characteristic were also considered.

Hogarth-Scott and Wilson's factors are similar to what Malem (2008: 403-404) identified as critical success factors for the survival strategies for fashion design businesses in the UK, namely business understanding, management of slow and sustained growth, added consultancy services, and consolidated contractual agreements, as well as a balance between retail and wholesale, complete business control, good industry relationships, and effective communication with market, along with international growth and last, mentorship. In totality, these findings balance internal business attributes and the external environment, primarily as support structures. Internal business attributes include factors such as Product Lifecycle Management (PLM), which requires an understanding of the external business processes by grasping market needs and consumer behaviour to adapt to rapid market changes (D'Amico *et al.* 2013: 1).

Understanding internal business attributes ultimately requires complete control over business operations, allowing for the maintenance of brand integrity through cohesive decision-making processes, potentially facilitated by digital transformation, which enables fashion businesses to maintain control over their operations, while adapting to sustainable practices (Huynh 2021: 871). With the understanding of business, comes the aptitude to distinguish when to add consultancy services that can diversify revenue streams, while maintaining a focus on core services to optimise offers and added advantages, strengthening the brand and improving financial performance (Castaldi and Giarratana 2018: 353). Further supporting the value of consultancy services, Bruhn, Karlan and Schoar (2012: 636) provide empirical evidence from a randomised control trial in Mexico, showing that management consulting significantly boosts SME productivity and financial outcomes. Their study highlights consultancy cannot only enhance operational efficiency but also foster an entrepreneurial spirit among business owners, thus contributing to sustained business growth.

Bridging the gap between internal and external factors is the balance between retail and wholesale operations that optimises market access and operational efficiency, as this integration allows brands to challenge traditional separations between retail and wholesale, by ensuring flexibility in channel strategies, which can significantly boost a brand's market presence (Rashid and Barnes 2021: 371). Nonetheless, a balance between wholesale and retail is not achievable without sales forecasting, which has

been deemed a critical success factor of the apparel industry, realised through relevant and reliable data collection from the distributors' information systems (Thomassey 2010: 270 & 482).

Extending to the external environment, good relationships within the industry, including partnerships with manufacturers, suppliers, and distributors, are vital for maintaining a seamless supply chain and ensuring timely delivery of products to consumers (Vázquez, Iglesias and Álvarez-González 2005: 125; Pooe 2020: 186). These good relationships are fostered by effective communication with the market to understand and respond to changing consumer preferences (Moorhouse and Moorhouse 2018: 8). This involves not only targeted marketing and advertising efforts but also active engagement with customers through social media platforms, brand events, and other promotional activities (Ananda and Hernández-García 2017: 2). By staying attuned to the needs and desires of their target market, fashion businesses can tailor their offerings and improve customer satisfaction, ultimately contributing to increased sales and brand loyalty (Ndlovu, Dandira and Chimbindi 2022: 2). With that effective communication, international expansion is then possible, offering significant growth opportunities for fashion brands to understand and respond to changing consumer preferences (Moorhouse and Moorhouse 2018: 8).

Expanding into international markets can present significant growth opportunities for fashion businesses, as global growth allows brands to tap into new consumer segments, diversify revenue streams, and reduce dependence on any single market (Abecassis 2007: 292). It also enables businesses to capitalise on global trends and leverage economies of scale to enhance profitability (Dhewanto *et al.* 2018: 268). However, international expansion requires careful strategic planning, market research, and understanding foreign regulations and consumer behaviours to navigate new territories successfully (Ngo and Igwe 2019: 3).

Diversifying into international markets may again require consultancy services or mentorship, which play a crucial role in the development and success of fashion businesses, by guiding in navigating the industry's complexities and providing lessons from experienced professionals (Montecchi 2016: 248). Mentorship, specifically, can provide valuable guidance on strategic decision-making, industry best practices, and

navigating challenges, ultimately contributing to long-term business success (Chen 2019). Seeking mentorship from established industry figures or joining mentorship programmes can provide fashion design entrepreneurs with the support and insights needed to thrive in the competitive fashion landscape (Aakko and Niinimäki 2018: 354).

For various small, medium and micro enterprises (SMME) in Bahawalpur, findings proposed that customer service, the expertise of the business and the experience of the manager were the critical success factors (Naqvi 2011: 17). Extending on these findings, it has been argued the integration of these critical success factors creates a robust framework for SMME resilience, particularly in challenging markets such as those often found in economies associated with the global south, suggesting the synergy between high-quality customer service, deep business expertise, and seasoned managerial leadership forms a foundation that supports sustained business success and scalability (Ngabaza 2017: 135-136).

Customer service remains a pivotal success factor for SMMEs, as it directly influences customer satisfaction and loyalty, since effective customer service strategies can significantly enhance customer retention rates in emerging markets, where personal interaction and responsiveness are highly valued by consumers (Ofori-Dwumfuo, Owusu-Ansah and Nartey 2013: 219). For an added advantage, businesses that possess comprehensive knowledge of their industry's regulatory, competitive, and technological environments tend to perform better, illustrating that industry knowledge and operational competencies are crucial for the success of SMMEs (Kozielski 2019: 322).

Assefa, Zerfu and Tekle (2014: 18-19) additionally identified higher equity, prior working experience in the formal sector, family business background, and government training and support, as well as working in smaller groups, manufacturing and skilled management from entrepreneurs, as critical success factors for Micro and Small Enterprises (MSE) in Ethiopia. Higher equity levels in MSEs are often associated with greater financial stability and increased capacity for investment in growth opportunities, because businesses with higher initial equity are less dependent on

external financing, which can be crucial for maintaining control and flexibility during the early stages of business development (Wonglimpiyarat 2012: 10).

The influence of prior working experience in the formal sector is also substantial, equipping entrepreneurs with skills and knowledge that are transferable to their own businesses, enhancing entrepreneur's understanding of operational standards, business processes, and market dynamics, critical for business success (Jones-Evans 1997: 65). Prior working experience can be supported by a family business background that provides not only practical business knowledge but also a support network, which is beneficial for navigating the challenges of entrepreneurship, as entrepreneurs from family business backgrounds have been found to have higher business acumen and access to mentorship, which significantly contributes to their success (Cardella, Hernandez-Sanchez and Sanchez Garcia 2019: 2).

In terms of governmental support and training programmes, this study is in agreement they are vital for empowering formal entrepreneurs, as they help bridge the knowledge gap for many entrepreneurs and provide essential resources and networks that support business growth (Mahmoud, Abou-Shouk and Fawzy 2019: 107). As for collaborations, specifically in smaller groups, they can enhance decision-making and operational efficiency, because those smaller, more cohesive groups tend to be more agile, allowing for quicker adjustments to business strategies and market conditions, which is a significant advantage in the dynamic business environments (Osmani 2020: 120-121). Furthermore, the manufacturing sector has been found to offer unique opportunities for independent businesses, due to its potential for scalability and value addition, as manufacturers working with independent businesses can leverage local innovations and adapt technologies at a lower scale, thus leading to substantial growth and competitive advantage (Montes and Olleros 2020: 72), suggesting the collaboration between manufacturers and independent fashion design entrepreneurs could be mutually beneficial.

A more theoretical and industry-driven approach to identifying critical success factors is with the balanced scorecard theory, which measures and motivates business unit performances and states there are four different areas used to measure the success or performance of business strategies and visions: namely internal processes,

financials, customers and learning or education and growth (Kaplan and Norton 1996: 54). The balanced scorecard theory has been widely accepted and applied; nonetheless, arguments remain that the theory does require tailoring based on the needs of a company or industry (Butler, Letza and Neale 1997: 242). For instance, fashion design entrepreneurs require the exact combination of [critical] factors that will support the successful trajectory of their [retail] businesses (Tremblay and Yagoubi 2014: 204).

Recent studies have applied aspects of the balanced scorecard within various sectors. For example, Csikósová, Čulková and Janošková (2016) used the balanced scorecard theory within the banking sector and advocated for the inclusion of sustainability practices in marketing management practices, demonstrating how to integrate three sustainability factors, which are economic, social, and environmental. As mentioned in chapter 2, under fashion retail product (section 2.2.2), the shift towards sustainability has also defined the recent era of fashion design entrepreneurship (Pookulangara and Shephard 2013; Jung and Jin 2016b; Štefko and Steffek 2018). Sustainability has increasingly become a non-negotiable element in the critical success factors for fashion design entrepreneurs. Fashion design entrepreneurs leveraging sustainability are finding it central to innovation and market differentiation, aligning with a global consumer base that is progressively prioritising environmentally responsible products (Thorisdottir and Johannsdottir 2019: 1). Moreover, sustainability can offer economic benefits to fashion design entrepreneurs by opening up new market niches and improving operational efficiencies. The synergy of organisational values with business model innovation around sustainability appears to be particularly significant for the financial performance of SMEs in fashion, indicating that embedding sustainability into the core business strategy is an important success factor (Yang and Jang 2020: 1). Therefore, it is clear sustainability plays a crucial role in the success of fashion design entrepreneurs (Thorisdottir and Johannsdottir 2019: 22).

Customer perspective has been found the most important factor within the balanced scorecard theory to evaluate performance within telecommunication companies (Khanmohammadi, Mohammadi and Mehdizadeh 2015). By focusing on customer-centric metrics that appeal to emotions, fashion design entrepreneurs can ensure their products and services resonate with their target audience and drive repeat sales (Kim

and Sullivan 2019: 2). In terms of internal processes, fashion businesses can evaluate their operational efficiency through agile supply chain management processes for product development to ensure smooth, sustainable and cost-effective operations that will, in turn, continuously streamline fashion design entrepreneurs' operations and reduce costs, ultimately contributing to improved profitability (Mustafid, Karimariza and Jie 2018: 2).

From a financial perspective, fashion design entrepreneurs could benefit from the use of the balanced scorecard theory for feedforward information [such as financial support needs], to reach financial goals (Malagueño, Lopez-Valeiras and Gomez-Conde 2018: 238). Last, the learning and growth perspective of the balanced scorecard theory emphasises the need for continuous learning, skill development, and innovation within the organisation; fashion entrepreneurs can measure their success in this area by tracking employee training and development, research and development efforts, and the implementation of innovative technologies and processes (Moussaid, Tkiouat and Hlyal 2020: 1).

Taking a similar approach, this study integrated both theoretical insights and practical adjustments to the balanced scorecard, specifically tailored for the critical success factors of retailing fashion design entrepreneurs. This was achieved by adapting the balanced scorecard to include modern metrics and industry-specific needs, to help retailing fashion design entrepreneurs and external support track and effectively reach their strategic goals. Figure 7 illustrates how this research planned to apply the balanced scorecard theory, in combination with the retail mix framework, to report and provide strategic measures for retailing fashion designers' needs from external support.

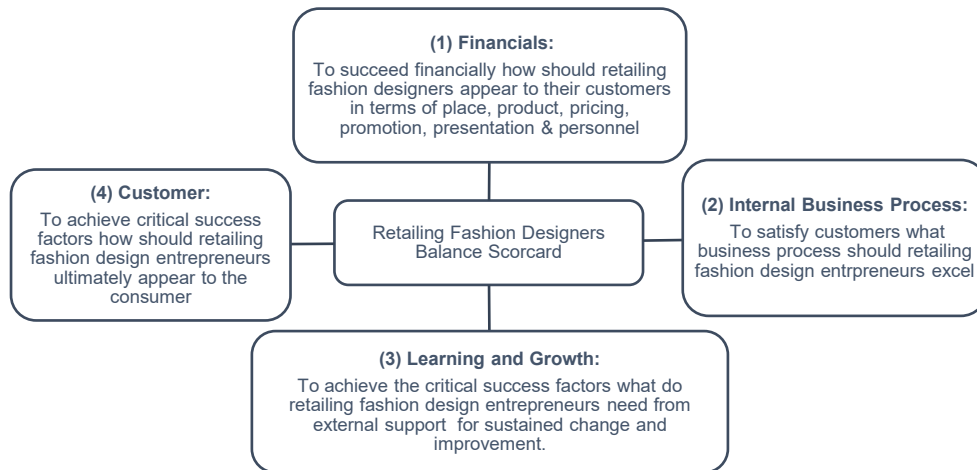


Figure 7: Balanced Scorecard Theory

Source: Kaplan and Norton (1996: 54)

It is clear several factors could potentially impact the business and financial results of retailing fashion design entrepreneurs. Overall, it is well-recognised that the internal and external environment influence the ongoing processes of SMMEs (Havierníková, Okreglicka and Kordoš 2019: 6), whereas the traditional measures focused on finances have been deemed inadequate for contemporary businesses (Pervan and Višić 2012: 213-214). Interestingly, the critical success factors identified throughout the literature for retailing fashion design entrepreneurs, eventually cover all the aspects of the retail mix, as well as some internal attributes.

The literature mentioned above provided some context regarding certain critical success factors of entrepreneurs in different countries and industries. It, therefore, grounded and guided the qualitative empirical research with retailing fashion design entrepreneurs. However, as the literature does not provide standardised critical success factors for retailing fashion design entrepreneurs, this study relied on empirical research from retailing fashion design entrepreneurs and consumers, to establish the critical success factors of retailing fashion design entrepreneurs in relation to external support, discussed in the following section.

3.2 RETAIL STRATEGY MATRIX THEORY

Rosenbloom (1976: 60) mapped out a theory that provided retailers with a framework to analyse their original trade area mix, in connection to the retail mix discussed in the previous chapter; this theory is known as the retail strategy matrix. Operationally, a trade area is a retailer's market environment defined by three basic dimensions: (i) TAG, which refers to the geographic extent of a retail trade area with customers, and (ii) the TAD, which refers to the purchasing power of consumers concerning consumer demand within a specific TAG, and, (iii) TAH, which refers to the mix of consumer market segments within a specific trade area (Rosenbloom 1976: 58-60). The concept of the trade area mix resonates with this study, as one of the objectives was to implement a comparison between two different trade areas, Germany and South Africa.

Rosenbloom (1976: 61) tabulated how numbered cells (1-18) within the trade strategy matrix redirected the retailers' focus to relevant strategies. Table 3.1 depicts the trade area and retail mix interaction, forming the retail strategy matrix. However, it should be noted table 3.1 reflects the updated version, with the 6Ps, instead of the original three sub-mixes Rosenbloom initially tabulated.

Table 3.1: Retail Strategy Matrix

Trade Area Mix Retail Mix	Trade Demand (TAD)	Trade Geography (TAG)	Trade Area Heterogeneity (TAH)
Place	1	2	3
Product	4	5	6
Pricing	7	8	9
Promotion	10	11	12
Presentation	13	14	15
Personnel	16	17	18

Source: Adapted from Rosenbloom (1976: 61)

3.2.1 Trade Area Demand (TAD): Consumers

This section integrates the retail strategy matrix theory and the kano model to analyse consumer behaviour and preferences. By identifying what consumers value from fashion retail through literature, this section will guide the empirical research with fashion design entrepreneurs, to ensure the external support policy-guidelines and framework align with fashion designers' retail needs to meet market demands.

Kennedy (2013: 1) underlined the importance of consumer satisfaction by identifying specific retail attributes rooted in high standards of corporate culture and ethics, resulting in significant quality levels, which led to customer satisfaction and, in turn, building consumer loyalty toward an enterprise. That is why it befitted this study to use various theories connected to consumer needs satisfaction and loyalty patronage to measure consumers' purchasing power towards retailing fashion design entrepreneurs, as consumers are the cornerstone of retailing fashion design entrepreneurs' critical success factors.

In agreement with Madhavan and Chandrasekar (2015: 78), this study believes that to analyse customer needs satisfaction, variables influencing buying behaviours and consumer preferences require consideration, as those factors lead to competitive advantage and the overall improvement of business performances. Consumers play a very critical role for businesses, as they are the individuals who purchase goods and services sold, therefore impacting the revenue of companies (Gajjar 2013: 10) and entrepreneurs alike. It has been alleged that specific factors such as service quality delight customers (Matzler *et al.* 1996: 17). Thus, this section investigates other probable reasons behind consumers' strong delight, by studying need satisfaction and patronage.

3.2.1.1 Consumer Need Satisfaction

One of the essential functions of businesses is to retain customers and to do so, it has become increasingly important to understand consumer needs (Saeed 2019: 6). Consumer needs have been the foundation and at the core of defining buying behaviour, as several researchers agree consumer buying behaviour is driven by needs, which motivate their selection process leading to the purchase, evaluation, usage and disposal of goods and services (Faison 1977: 172; Mitchell 1992: 28; Bray

2008: 2; Gajjar 2013: 11; Sharma 2014: 833; Madhavan and Chandrasekar 2015: 75). Needs are defined traits that compel individuals to action specific goals that provide purpose, meaning and direction; therefore, needs are solicited psychologically or objectively (Ward and Lasen 2009: 1).

Doyal and Gough (1984: 10) attacked the subjectivism of needs and wants theories by developing a construct that addressed both individual needs (identified as survival/health and autonomy/learning goals) and basic societal needs (identified as production, re-production, culture/communication and political authority). By addressing societal and individual needs, Doyal and Gough argued that human needs were systematic and intertwined, similar to a network that depended on one another for overall success, unlike Maslow's theory, which only addresses individual needs.

Maslow's hierarchy of needs is a widely accepted motivational needs theory, a more psychological approach to the needs theory, conceptualising human needs in ascending order (Kaur 2013: 1061). This prevalent theory was originally a five-tiered theory, with the original needs identified as (i) physiological needs, which are basic needs such as food; (ii) safety needs, which are needs associated with security; (iii) social needs, which are needs linked to love and to belong; (iv) esteem needs, which incorporate the need for self-enhancement and last (v) self-actualisation needs, which are the needs for consciousness and improvement (McLeod 2018: 1). Later the model was expanded to include cognitive, aesthetic and transcendence needs (Maslow, 1970 cited by McLeod 2018:6).

At its core, Maslow's theory proposes human needs are structured in a hierarchal pyramid format, with the needs at the lower end of the pyramid requiring fulfilment before the needs at the higher end of the pyramid (Conley 2017: 8). Furthermore, the eight-stage model is divided into two categories, where the first category comprises the deficiency needs, which are the primary needs located at the bottom half of the model (basically the original needs without self-actualisation) and the second category is made up of the growth needs, situated at the top-end of the model; in ascending order, they are cognitive, aesthetic, self-actualisation and transcendence needs (McLeod 2018: 1 & 7).

The growth needs are, similarly, parallel to the gratification/activation principle, which articulates that the satisfaction or gratification of the basic needs leads to the satisfaction or gratification of the following higher-ranking needs, while the deficiency needs are categorised under the deprivation/domination principle, which states the deficient needs are the most critical (Raaij and Wandwossen 1977: 2-3). Conley (2017: 116) postulates that Maslow's motivational-need theory can provide a better understanding of consumers, as the approach was previously applied to their hotel business and served as a reminder that consumers are a collective of individuals with psychological needs and meeting their principal needs forms a baseline to customer satisfaction.

While Maslow's theory explained motivational needs in a hierarchal format, Alderfer (1969: 144) developed the ERG theory, described in contrast to Maslow's theory, with different approaches to need categories and the relationship between need satisfaction and desires. ERG theory was designed to understand, explain and predict what satisfies and drives the desires of human needs based on three main categories: existence needs, relatedness needs, and growth needs (Alderfer, Kaplan and Smith 1974: 507).

When Schneider and Alderfer (1973: 490) compared the ERG theory to Maslow's five-tiered motivational-need theory, they matched Maslow's physiological and material safety needs to the ERG existence needs. This resulted in Maslow's interpersonal safety, belongingness, and interpersonal esteem needs being equated to ERG's relatedness needs and Maslow's self-confirmed esteem and self-actualisation needs to ERG's growth needs. Thus, Schneider and Alderfer separated Maslow's safety needs into material and interpersonal safety needs, and esteem needs were divided into interpersonal and self-confirmed. Though the ERG theory preserves the concept of need hierarchy, there is a significant difference that with the ERG theory, needs do not require a strict order but instead, suggest needs can occur concurrently and be met simultaneously, in no particular order (Alderfer 1969: 154).

In efforts to link human needs with consumer needs, kano quantified satisfaction, dissatisfaction and performance, by visualising spoken and unspoken information from consumers (Ward and Lasen 2009: 9, 10). At the core, consumer satisfaction relates

to how the complete attributes of products and services explicitly and implicitly fulfil human needs, thus, the model developed by Kano, referred to as the kano model, is aimed at examining how the performance of products and services impact consumer satisfaction. This is achieved by proposing a non-linear relationship between the performance of products/services attributes and customer satisfaction and classifying them into five attributes, which are 'must-be', 'one-dimensional', 'attractive', 'neutral' or 'reverse' (Tontini, Sørensen and Silveira 2013: 1253).

The first three attributes are the foundational categories of the kano model, with the 'must-be' attribute described as the basic requirements from a customer, which does not necessarily increase satisfaction. Although, when these requirements are unmet, the customer will most likely be dissatisfied. In contrast, the 'one-dimensional' attribute suggests customers' satisfaction is in proportion with their fulfilment, thus, the higher the fulfilment, the higher the satisfaction and the 'attractive' attribute has a larger influence on customer satisfaction, as these are the aspects of a product/service that are unexpected nor explicitly expressed (Matzler *et al.* 1996: 6, 7). Furthermore, the 'indifferent' attributes are aspects within a product/service that do not significantly contribute toward customer satisfaction, and the 'reverse' are those aspects of a product/service that, when present, cause dissatisfaction or visa-versa (Ullah and Tamaki 2011: 156).

Though the kano model, illustrated in figure 8, primarily analyses customer satisfaction, when used appropriately, it is argued it could steadily grow new customers and achieve customer loyalty (Južnik Rotar and Kozar 2017: 344). Therefore, the kano model approach to measuring different product attributes was used to measure different 6Ps constructs, discussed in chapter 2 and summarised in table 1.

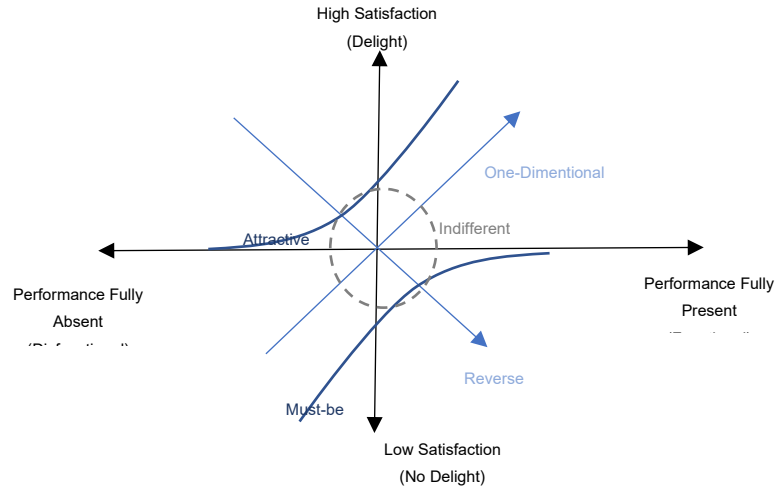


Figure 8: Kano Model

Source: Ullah and Tamaki (2011: 156)

3.2.1.2 Loyalty Patronage of Consumers

Consumer patronage correlates with loyalty patronage, which addresses the consumers' favourable image of an enterprise, due to past functional or psychologically satisfactory experiences with the enterprise (Osman 1993: 135). It is, therefore, essential to research what consumers consider a favourable image from retailing fashion design entrepreneurs to achieve patronage and what fashion designers perceive as a favourable image. There is a clear link between consumer needs satisfaction and consumer loyalty patronage, as increased consumer loyalty leads to repeated purchases, increased market share and profitability (Južnik Rotar and Kozar 2017: 339). Simply put, consumer loyalty is believed to be achieved by satisfying consumer needs (Saeed 2019: 11).

The importance of loyalty patronage was recognised by Osman (1993: 134), as they conceptualised a loyalty patronage model, which linked loyalty patronage to two sources; the first source being the congruity between customers and management store image, where the customers' store image is influenced by their lifestyle as well as their shopping orientation and the management store image being influenced by perceived attributes the management believe to be essential for customers; with the second source of loyalty patronage being the past purchase experience of customers. Darden *et al.* (1981: 657) initially contested consumers do not necessarily choose the closest retailers but rather, choose outlets that are closely associated with their own

perceived image and where they can find suitable products and individuals similar to them; thus, variables such as values, sex role, occupation, mobility and age were identified as factors that link consumers' patronage.

In agreement, Rehman *et al.* (2017: 408) presume personal characteristics such as age, occupation, economic situations, and lifestyle, as well as personality and self-concept, all strongly influence the buying behaviour of consumers. Accordingly, segmentation requires significant consideration when evaluating consumer needs, satisfaction and loyalty patronage, as strategies can be designed in consideration of the particular segments' needs and wants (Saeed 2019: 10). With that in mind, the comparison between Germany and South Africa is vital to provide valuable insight into the two different developments of the countries and their segments. Chapter 4 will then discuss the additional segmentation quotas between Germany and South Africa and how they will be measured.

The shopping preference theory by Sheth (1981: 4) is most captivating, integrating a wide range of approaches to construct variables and determinants. The four variables are shopping predisposition, choice calculus, shopping motives and shopping options. In addition, the shopping preference theory determinants correlate with most of the patronage and retail theories and establish a psychological paradigm for consumers. The determinates are classified as supply-orientated- and demand-orientated determinates; the supply-orientated determinates include market determinates (location, retail structure and positioning) and company determinants (merchandise, service and promotion); while the demand-orientated determinants include personal determinants (personal values, social values and epistemic values) and product determinants (product typology, usage typology and brand loyalty) (Sheth 1981: 15). What is most prevalent regarding this theory, is it incorporates the retail mix discussed in chapter 2. As a result, this study adopted the concept of shopping preference with the retail mix, to outline the critical success factors of retailing fashion design entrepreneurs, as illustrated in figure 9.

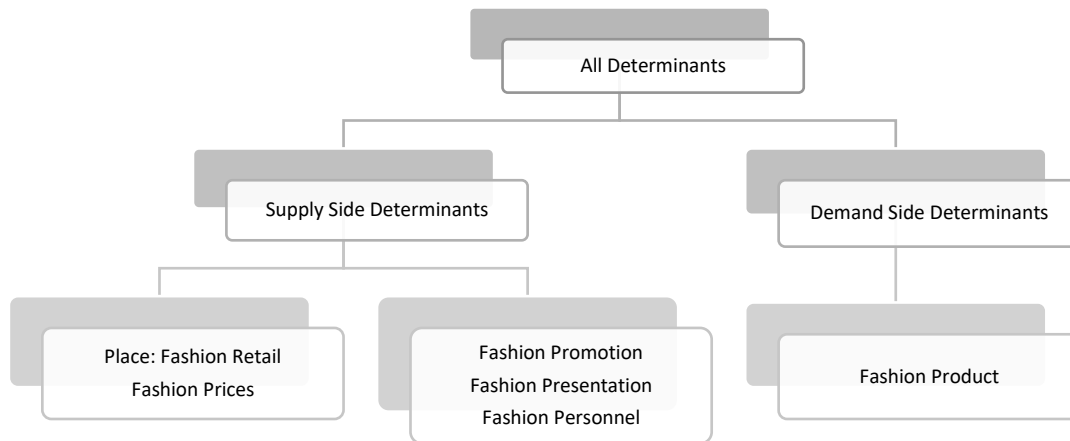


Figure 9: Determinants of Shopping Preference Theory

Source: Adapted from Sheth (1981: 15)

The theories discussed in this section allow for a comprehensive understanding of consumer aspects to consider when evaluating the buying motives of consumers. Therefore, these theories will guide consumers' empirical research and analysis. Additionally, the theories drive the empirical research with fashion design entrepreneurs to evaluate how they currently employ measures to meet consumer needs and satisfaction and achieve consumer patronage. Figure 10 illustrates how the important factors discussed in this section are connected.

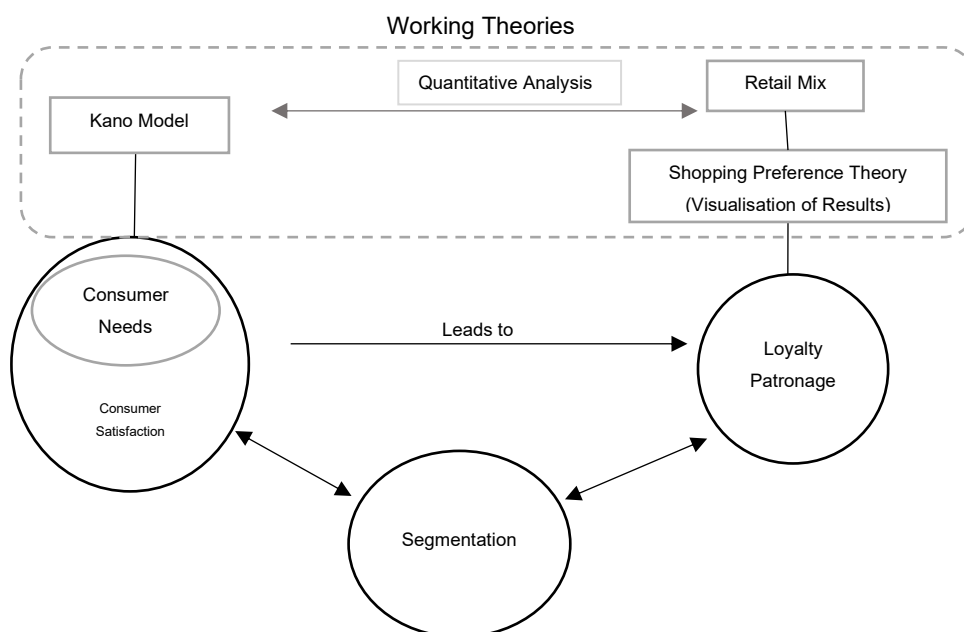


Figure 10: Conceptual Framework of Trade Area Demand (TAD)

Source: Developed by Author

3.2.2 Trade Area Geography (TAG): External Support

This section concentrates on the geographic trade areas, where external support operates to deliver different resources to fashion design entrepreneurs. It highlights the importance of tailored support mechanisms, such as financial assistance, networking opportunities, and industry-specific training. Understanding these existing frameworks allows for the identification of gaps and the development of more effective support policies. This is in line with this study's third objective, which was to define the type of external support in Germany compared to South Africa and to propose appropriate external support policy-guidelines. External support represents a range of organisations that provide [retailing fashion design] entrepreneurs with assistance in specific or general areas for business growth and development (Virani and Banks 2014: 2).

Another term incorporated within external support is business development services (BDS), however, BDS is a concept associated more with non-financial support services in the form of business training, administration or financial management, mentorship, and consultancy or advisory services, in addition to technology development or transfer, business network or linkages promotion, marketing skills information or market opportunities and export assistance (Lwesya, Mwakalobo and Mbukwa 2021: 2). While financial support remains crucial, the non-financial aspects such as training and market access, significantly enhance operational efficiencies and market responsiveness, contributing to overall performance improvement of small businesses (Khanmohammadi *et al.* 2015: 118). For instance, a South African study underscores the importance of BDS in enhancing business skills among fashion entrepreneurs, particularly in peri-urban communities. The findings advocate for comprehensive training programmes in business planning, financial management, and market research to boost the sustainability of local fashion businesses (Nana, Van Staden and Coetzee 2021: 10). Furthermore, programmes that incorporate innovative training methodologies, strategic planning and technical design skills are vital for micro clothing business owners in South African townships; these programmes include empowerment incubation hubs that help artisans to reach broader markets beyond local confines, enhancing business growth and sustainability (Tselepis 2018: 307). Moreover, for BDS to foster a conducive environment for entrepreneurial growth and

innovation, it has been linked to personal traits of business owners, as research from the Gauteng province in South Africa indicates that traits such as risk-taking, self-confidence, ambition, and motivation, along with positive attitude, creativity, opportunity recognition and commitment, significantly impact the success of fashion businesses (Moloi and Nkhahle-Rapita 2014: 80-82).

These studies reinforce the critical arguments that while financial support is essential, non-financial BDS provide a complementary layer of support equally crucial for business strategic growth, operational sustainability, and competitive positioning, particularly in dynamic and resource-constrained environments. Though all the BDSs were considered for this study, financial support and other unidentified support scopes were also considered outside retailing fashion designers' businesses.

In another context, and in the same realm as the external support discussed in this study, is the concept of business support organisations (BSO), which (unlike BDS) highlights financial institutions in its definition amongst innovation centres, technological parks, incubators, and technology transfer offices and entrepreneurship centres for training and consulting services (Gorączkowska 2018: 742). Nonetheless, the nature of the relationship between both financial and non-financial supports within BSO has been found to not be without its challenges, though crucial for the SME or the entrepreneurial ecosystem, albeit their effects were not thoroughly interactive, indicating separation of support types was necessary and might be more beneficial for the economies such as South Africa (Ogujiuba, Eggink and Olamide 2023: 14). For that reason, the financial support needs were evaluated separately in this study.

It is important to note that though the definition of BSO aligns with that of external support, the BSO term was not incorporated in this study, as BSOs have been strongly associated with not operating for-profit institutions, which also offer an array of support services, including consultancy, training, and financial assistance, varying in scale and scope but consistently playing a vital role in regional development and support for entrepreneurship and innovation (Leoński 2022: 584). Though this study agrees with the array of support services associated with the BSO term, the objective is not to focus only on non-profit organisations (NPO) but also on for-profit organisations supporting retailing fashion design entrepreneurs.

Overall, this study echoes the general sentiments and findings associated with BSOs, as they are, on the one hand, viewed relevant for significantly enhancing the likelihood of innovation activities and cooperation among enterprises, though with varying degrees of influence (Gorączkowska 2018: 753). On the other hand, Kouam *et al.* (2022: 4) observed that in sub-Saharan Africa, BSOs were crucial in promoting SME growth, in the face of challenges in fulfilling their missions and maintaining financial health, contingent upon the quality of services provided, with strong technical and managerial skills. BSOs have, additionally, been identified as a key component of economic policy and as crucial in the European Union (EU), with its member states, for supporting enterprise activity and development, particularly SMEs (Leoński 2022: 584). They facilitate access to market information, technology, and innovations that are otherwise challenging for individual entrepreneurs to acquire. BSOs not only act as conduits of information but also as catalysts for networking and collaboration, essential for innovation in the competitive fashion sector (Todeva and Rakhmatullin 2016: 9-10).

Training and skill development facilitated by BSOs are tailored to the specific needs of fashion design entrepreneurs, focusing on areas such as digital marketing, sustainable practices, and supply chain management (Kozłowski *et al.* 2015: 393). These programmes enhance fashion designers' capabilities to compete effectively, locally and globally. Financial support is another critical area where BSOs contribute significantly, facilitating connections with financial institutions and aiding in acquiring financial resources through grants and funding opportunities (Leoński 2022: 583). Nonetheless, the provision of financial support by BSOs is not without challenges; entrepreneurs often face barriers such as inadequate technical skills and poor market access, which hinder the effective utilisation of financial resources, and to address these challenges, innovative financial tools and systematic support are necessary to ensure social, economic, and environmental impacts in communities, as seen in social entrepreneurship initiatives in Ukraine (Ilchenko and Kiselev 2022: 1).

The success of entrepreneurial ventures, particularly among youth, moreover, appears to be significantly influenced by non-financial services provided by BSOs. Studies indicate non-financial training programmes, such as those focusing on

marketing, innovation, risk-taking, and management skills, have a greater impact on entrepreneurial success than financial training alone; this suggests a need for BSOs to prioritise these areas to support young entrepreneurs effectively (Msimango-Galawe 2022: 95). The effectiveness of BSOs also varies significantly across different global and regional contexts. For example, the perception and structure of financial support in Slovakia show that while financial assistance is crucial, it must be well-structured and responsive to the specific needs of entrepreneurs to be effective; this highlights the importance of a tailored approach in the provision of support to SMEs (Musa, Musova and Sliacky 2017: 47).

Policies guiding fashion designers to receive vital grants and investments have been recognised as necessary for the creative sector; thus, policymakers have been deemed beneficial in building on existing strengths and opportunities to support entrepreneurs' business growth (Brydges and Pugh 2017: 958), which was the fundamental objective of this study. Regional and local policies are pivotal in creating conducive environments for fashion design entrepreneurs, focusing on macro-level stability, such as economic conditions and micro-level supports, including training, technology transfer, and market access (McQuaid 2002: 909). In addition, educational and marketing support policies specifically enhance the innovativeness and proactiveness of entrepreneurs, which are crucial for navigating the competitive fashion industry; such policies not only equip entrepreneurs with the necessary skills but also enhance their capacity to innovate and adapt to market changes (Kwon and Yang 2016: 21).

The regulatory environment also plays a significant role in shaping the effectiveness of BSOs, because policies that are enabling, rather than constraining, can significantly boost the entrepreneurial spirit by reducing bureaucratic hurdles and fostering a more innovation-friendly environment (Jacquemin and Janssen 2015: 858). Policies aimed at supporting diverse groups within the entrepreneurial community, such as women, minorities, and youth, are also crucial, as tailored support for these groups helps in overcoming specific barriers they face, thus, enhancing inclusivity in the entrepreneurial ecosystem, with these efforts not only promoting diversity but also driving innovation, by incorporating a wide range of perspectives and ideas into the fashion industry (OECD 2015: 107). Additionally, the effectiveness of these policies

must be continuously evaluated to ensure they meet the evolving needs of fashion design entrepreneurs. This ongoing assessment helps adjust policies to better support the dynamic nature of fashion businesses and ensures BSOs can provide relevant and impactful support (Bergman and McMullen 2021: 688).

This support is invaluable, particularly for SMEs that face significant barriers to entering foreign markets. In essence, BSOs significantly foster cooperation within industries for new solutions, acting as integral components of the institutional framework that supports the innovative economy through state interventions and knowledge transfer (Świadek and Gorączkowska 2020: 812), which for this study, includes other external entities with the intentions to support retailing fashion design entrepreneurs. The additional role of BSOs is lobbying for favourable policies, and providing direct support is significant, yet, their influence can vary, and their agendas do not always align with the needs of all fashion entrepreneurs, particularly those at the grassroots level (Leoński 2022: 583). Therefore, ensuring BSOs represent a broad spectrum of interests within the fashion industry is crucial, rather than merely the priorities of a few dominant players.

Additional external support outside of BSOs is necessary for retailing fashion design entrepreneurs, due to the number of challenges encountered within supply chain management (Pooe and Mugobo 2019: 73-78). Currently, SMMEs are influenced by several factors in the business environment, such as public, social, economic, and local, as well as environmental, which fundamentally affect the entities' financial results (Havierníková *et al.* 2019: 6, 75). It has been demonstrated that intermediary organisations have an essential role in influencing the success of fashion design entrepreneurs by developing a dynamic industry, reducing risk, fragmentation and isolation (Tremblay and Yagoubi 2014: 204-205). Thus, for fashion design entrepreneurs to succeed on the business side, additional support is required to achieve a proper balance (Jacobs *et al.* 2016: 1410). However, the effectiveness of these external support services has often been hindered by mismatches in supply and demand, high service costs, and a shortage of qualified providers (Lwesya *et al.* 2021: 12).

Readily available access to information regarding external resources is crucial for fashion designers' success, as they usually have limited knowledge, general financial difficulties, problems with sourcing, and production of small quantities, in addition to marketing and business development issues (Fernandes 2019: 7-8). It is important to increase information related to external support in different regions, as the lack of information available to fashion design entrepreneurs has been identified as an ongoing issue in Portugal and South Africa. As a result, a closed-loop model and effective supply chain were recommended for retailing fashion design entrepreneurs in South Africa, while the information hoop model was developed for Portugal (Fernandes 2019: 8; Pooe 2020: 179). The hoop model in Portugal was designed to benefit fashion design entrepreneurs by demonstrating a closed triangle to manage external information flow and consisted of functions such as information guide, networking, consulting and mentoring (Fernandes 2019: 9). The closed-loop model in South Africa illustrated an efficient supply chain management model for retailing fashion design entrepreneurs dependent on close proximity of supply chain resources and good communication, which could only be achieved through the facilitation of external bodies or support (Poee 2020: 180).

Good communication could, therefore, foster much more intimate relationships and interactions than ever between designers, manufacturers and consumers in the fashion industry (Sun and Zhao 2018: 373). In the same perspective, this study concentrated on the relationship retailing fashion designers develop with external support and consumers, to develop more intimate relationships and interactions than before. In relationship marketing, retailing fashion design entrepreneurs and external support are categorised under the business markets' interaction and network tradition, with three interrelated sets of goals; the first is to understand and explain exchange behaviour and relationship development between organisations, the second is to know how the nets of relationships evolve, and the third goal is how the market functions and grows from a network perspective (Möller and Aino 2000: 39). Categorically, relationship marketing refers to all marketing activities intended to establish, develop and maintain successful, committed and trusted relational exchanges between partnerships such as NPOs and focal firms (such as retailers) or between government organisations and focal firms (Morgan and Hunt 1994: 21-22), a concept that could be beneficial for retailing fashion design entrepreneurs and external support.

Overall, external support, BSOs and BDS are instrumental in nurturing entrepreneurship and innovation across various regions and economic sectors. Their services, both financial and non-financial, contribute to the development and sustainability of SMEs. The variation in the impact of these organisations accentuates the complexity of their roles. The rest of this section will concentrate on the relationship exchanges between supportive partnerships intended to influence the critical success factors of retailing fashion design entrepreneurs in Germany and South Africa. The geographic structures of the respective countries will also be discussed, as the geographic features of a country are one of the factors that directly impact economic development and shape institutions (Acemoglu 2012: 546).

3.2.2.1 Context on External Support in Germany

With the fourth largest economy in the world, Germany's GDP reportedly accounts for more than 24 percent of the EU's GDP (International Trade Administration 2023). The geographic area of Germany consists of three small city-states of Berlin, which is the capital, Hamburg and Bremen, then the larger West German states of Bayern (Bavaria), Baden-Württemberg, Rhine land-Palatinate (Rheinland-Pfalz), and Hesse(n), as well as North Rhine-Westphalia, Niedersachsen and Schleswig-Holsten, and the larger Eastern German states of Mecklenburg-Vorpommern, Brandenburg, Saxony-Anhalt (Sachsen-Anhalt), and Saxony (Sachen) and Thuringia (Thüringen) (Schönwälder 2013: 639-640). The three city-states are also major metropolitan cities in addition to Düsseldorf, Cologne, Frankfurt, and Stuttgart along with Munich (Senn-Kalb *et al.* 2022: 15).

Various external support organisations for fashion design entrepreneurs have been identified in some of Germany's major metropolitan and city-states. Based in Cologne, BTE (n.d.) is a federal trade association interested in the textile, shoes, leather goods and retail trade, working with industry decision-makers, suppliers, trade fairs, and fashion centres, in addition to consumer associations and interest groups. BTE was established for owner-managed and independent companies in Germany's textile, shoe and leather goods retail industry. The organisation provides essential work, solves technical problems, provides vocational training, and provides information from specialists, as well as assists with important questions regarding efficiency and

equality, while coordinating partnerships and information-sharing policies and cooperation within the industry. Moreover, BTE oversees the European Fashion Group, founded in 1989, which has supported medium-sized fashion suppliers such as producers, wholesalers and other fashion agencies since 2018, with retail industry information and communication meant to achieve cost advantage through bulk buyer conditions (European Fashion Group n.d.).

Government-funded Textil+Mode (2019) is located in Berlin and supported by the German Federal Ministry for Economic Affairs and Energy. Textil+Mode is a confederation for the textile and fashion industry, representing the economic, social, political, international and collective bargaining interests of the fashion and textile industries through networking, research and joint funding between entities for national and international exposure. Another government entity supporting the fashion industry since 2007 is the Senate Department for Economics, Energy and Public Enterprises. The support has been through grants and loans that fund fashion design entrepreneurs' fashion show slots, advertising/poster campaigns, digitisation of business processes and offering a digital map listing more than 100 Berlin fashion design entrepreneurs (Project Zukunft n.d.). Berlin Fashion Week was added to the Senate Department for Economics, Energy and Public Enterprises portfolio in 2013, funding showrooms at Paris Fashion Week and supporting fashion design entrepreneurs with trade, marketing, coaching, and workshops, as well as networking, focused on sustainability and fashion tech (Berlin Fashion Week n.d.).

The workshops and coaching at Berlin Fashion Week are supported in collaboration with the Fashion Council Germany (Project Zukunft n.d.). The Fashion Council Germany was established in 2015 to lobby, represent, position, and coordinate, as well as network, mentor, and support German fashion, focusing on education, sustainability and fashion (Fashion Council Germany n.d.). Additionally, the Fashion Council Germany previously cooperated with Messe Frankfurt to spearhead a conference targeted at making systematic change within the fashion industry, with topics related to sustainability, crafts, digitalisation and technology (Werkstatt der Zukunft 2021). Moreover, in collaboration with Messe Frankfurt and supported by Frankfurt Economic Development (a subsidiary of the City of Frankfurt), Frankfurt

Fashion Week showcases and finances fashion design entrepreneurs in and around Frankfurt (Frankfurt Fashion Week 2022).

Though other states do not have reports on fashion-specific support for entrepreneurs, overall, the Federal Government (n.d.) of Germany has documented funding programmes, equity and bank loans targeted at entrepreneurs in various industries in the country. Some funding opportunities offer favourable conditions for entrepreneurs through reduced-interest-promotional loans, guarantees or suretyship, venture capital and non-refundable grants (Federal Ministry for Economic Affairs and Energy 2021: 1).

3.2.2.2 Context on External Support in South Africa

Regardless of South Africa being regarded as one of the most “advanced, diversified, and productive economies in Africa. Boasting one of the most pro-business environments on the continent”, the GDP per capita dropped to what it was just over 16 years ago; mainly attributed to the COVID-19 pandemic (International Trade Administration 2024).

The geographic area of South Africa consists of nine provinces and three capitals; Pretoria, the administrative capital, is in the smallest province of Gauteng, which is also the most populated and urbanised province, and Bloemfontein, the judicial capital, is located in the fourth-largest province of the Free state, with Cape Town, the legislative capital, in the fifth-largest province of the Western Cape, while the largest and least populated province is the Northern Cape, comprising a third of South Africa’s geographic area (South African Government 2019: 2). The remaining provinces include the Eastern Cape, which is the second-largest province, followed by the North-West, Limpopo, KwaZulu-Natal and the second-smallest province, Mpumalanga (GCIS 2020).

Several South African government departments reportedly offer support to creative sectors, as well as fashion design entrepreneurs. With limited options, the Department of Sport, Arts and Culture (DSAC) only documents the Mzansi Golden Economy (MGE) funding initiative, which is a grant that aims to improve the economic development and social cohesion of the arts, design, cultural and heritage sectors,

and is aimed at projects that stimulate demand, increase market share, build heritage resources, as well as develop research, grow human capital and improve cultural entrepreneurs (DSAC 2018).

The Department of Trade, Industry and Competition (The dtic) (2022: 3), is more comprehensive in documenting funding assistance. Some of the dtic programmes is specifically targeted at improving the overall competitiveness of the clothing, textiles, footwear and leather sectors through their programmes which are (i) the expansionary working capital fund intended to support product localisation growth, (ii) start-up funding aimed explicitly at fashion design entrepreneurs driving broad-based transformation and (iii) cluster funding for group projects targeting the global market. In addition to the industry-specific funding, the dtic offers generalised funding opportunities to businesses and entrepreneurs.

The Export Marketing and Investment Assistance Scheme (EMIA) was initiated by the dtic to increase the export potential of SMMEs by offering funding incentives that enable businesses to scope, research, promote, and invest, as well as participate in exhibitions or buying missions intended to increase foreign direct investments. While EMIA targets individual companies, the Sector Specific Assistance Scheme (SSAS), also by the dtic, targets organisations such as export councils, joint action groups, the small enterprise development agency (SEDA), and provincial investments, along with economic development agencies and industry associations interested in developing emerging exporters.

On the whole, there are 25 funding programmes within the dtic; however, the three aforementioned are the most relevant for retailing fashion design entrepreneurs, because they were found to focus on direct market access opportunities. Specifically targeted at entrepreneurs in all sectors and working with the dtic in some projects, is the Department of Small Business Development (DSBD). The DSBD is one of the newest government departments, established in 2014, to develop entrepreneurs and SMMEs through their Small Enterprise Finance Agency (SEFA) and SEDA. The DSBD supports entrepreneurs and SMMEs with training, procurement of service providers, business machinery and equipment, and offering small business loans and grants (DSBD 2021: 28-30).

Beyond government departments and agencies, there are two fashion councils in South Africa. Recognised as the Western Cape Province and City of Cape Town funding channel and established as a non-governmental organisation (NGO) in 2006 for the provincial fashion, accessories and footwear designers, is the Cape Town Fashion Council (CTFC) (Cape Town Fashion Council n.d.). The CTFC offers fashion entrepreneurs online marketplace platforms for retailing products. Second, they provide training programmes with industry consultants for fashion entrepreneurs to rebuild, restructure and reassess business structures. Finally, their online channel offers educational resources for skills development (CTFC Digital n.d.). Most recently, the Eastern Cape Fashion Design Council (ECFDC) was established to promote economic growth, retail marketing development, skills development and fundraising for fashion, design and craft SMMEs and entrepreneurs in the province, to access the national and international markets through their online store and mentorship programmes (ECFDC n.d.).

Partnered with the CTFC and the City of Cape Town is South African Menswear Week (SAMW), which takes place twice a year in Cape Town and aims to promote menswear fashion in South Africa and around the African continent, by offering a platform where fashion design entrepreneurs can showcase their collections for retail while gaining exposure (SAMW n.d.). The Durban Fashion Fair (DFF) is another fashion showcasing platform located in the province of KwaZulu Natal, funded by the eThekweni Municipality since 2012. It provides publicity, access to retail and buyers, trade fairs, and educational workshops, in addition to mentorship programmes, skills training and access to other national and international showcases (DFF n.d.).

Located in Gauteng, Johannesburg, South African Fashion Week (SA Fashion Week) is the longest-standing fashion showcasing platform in South Africa; with more than 24 years of experience in B2B marketing and sales, SA Fashion Week developed its portfolio over the years to include B2C platforms, sustainability work, value chain development, as well as entrepreneurial skills development, through training programmes focused on financial management and training for international online trading (SA Fashion Week 2021: 3, 9 & 10). Offering a similar showcasing platform is African Fashion International (AFI), also located in Gauteng, Johannesburg, and

established in 2007 to invest, market and showcase African fashion nationally and internationally, offer online B2C omnichannel retail platforms, create training initiatives and convening platforms for fashion design entrepreneurs (AFI n.d).

3.2.2.3 Overview of External Support

Considering the above-mentioned (the external support outline for Germany and South Africa), it is evident there has been increasing assistance and support from the government and other institutions in Germany and South Africa over the past decades, aimed at influencing the success of retailing fashion design entrepreneurs.

That support can be summarised as business operational support, financial support, marketing support, and trading support, as well as business management support, training support, technological support, and sustainability support, along with networking support and research & development support. However, how the various external support functions impact and influence the critical success factors for fashion design entrepreneurs in retail remains unknown.

It should be noted table 3.2 only summarises the initial external support functions identified in Germany and South Africa. The empirical research on retailing fashion design entrepreneurs could disprove or prove the reviewed literature.

Table 3.2: Breakdown of Identified External Support in Germany and South Africa

Support	Germany								South Africa									
Support Orgs.	BTE/ EFG	FCG	FFW	Textil + Mode	BFW	Fed. Gov.	EEP Senat Dept.	Total	DS AC	The dtic	DS BD	CT FC	EC FDC	SA MW	SAFW	DFW	AFI	Total
Operational / Production		x				x		2		x	x							2
Business	x	x				x		3	x	x	x	x						4
Financing			x	x		x	x	4	x	x	x							3
Marketing			x		x		x	3	x			x	x	x	x	x	x	7
Networking & Collaboration	x	x			x			3				x						1
Research & Development				x				1	x									1
Sustainability		x			x			2							x			1
Tech.	x			x	x			3										0
Trading	x			x	x			3		x		x	x		x	x	x	6
Training & Education	x	x			x			3				x	x	x	x	x	x	6
Total	5	5	2	4	6	3	2	27	4	4	3	5	3	2	4	3	3	31

Source: Developed by Author

Taken as a whole, the table provides a comparative overview of the support mechanisms available to fashion design entrepreneurs in Germany and South Africa. The analysis reveals that marketing and trading support are significantly more available in South Africa, whereas support in Germany is more focused on financing. Both countries offer equal levels of training and education support. Notably, research & development and sustainability support are minimal in both contexts. This comparative breakdown showcases the different emphasis areas in each country, potentially reflecting the specific needs gap and developmental stages of the fashion industry in these regions.

3.2.3 Trade Area Heterogeneity (TAH)

Within each market segment, heterogeneity has often been overlooked (Hayashi, Hsieh and Setiono 2010: 860). Even in homogeneous segments, heterogeneity may still occur (Jensen *et al.* 2019: 262). Initially, the primary variable used to capture heterogeneity was the measure of population density and its impact on the country or the diversity of people (Adetutu and Ajayi 2021: 11). Nevertheless, heterogeneity not only addresses population density measures alone; but also the different responses

consumers display towards other attributes offered to them (Adhikari, Basu and Raj 2013: 7).

It is important to note people are diverse concerning their product preferences, shopping destinations, how they communicate, and price sensitivities, which means businesses need to successfully execute the retail mix in a way that addresses the distribution of consumer heterogeneity and identifies consumer preferences at their level (Allenby and Rossi 1998: 76). For instance, higher price points were found to cause heterogeneity in the food market (Hasselbach and Roosen 2015: 622). Price has, additionally, been considered a variable associated with products to measure consumer heterogeneity on their willingness to pay for product quality and transactional costs (Shi, Liu and Petruzzi 2013: 1163). Higher price points are also associated with fashion design entrepreneurs. Nevertheless, empirical research is required to indicate the heterogeneity of this variable, together with the other variables within the retail mix.

Historically, demographics predominantly observed heterogeneity distribution (Rossi, McCulloch and Allenby 1995: 323). Recently though, heterogeneous characteristics have been addressed with more than age or gender differences; they have also been addressed through prior consumer knowledge, cognitive styles, and shopping motives (Fang *et al.* 2016: 117). A variable successfully applied to the fashion industry to detect heterogeneity and to attain customer lifetime value, is lifestyle, with variables such as demographics and psychological characteristics found not to be sufficient to address motives underlying buying decisions or characteristics not to be generalisable or too complicated to implement (Dahana, Miwa and Morisada 2019: 320). Nonetheless, with consumers seeking variety, there is a potential for taking note of unobserved consumer heterogeneity, requiring businesses to identify the different varieties consumers require at micro levels and to establish whether different segments demonstrate diverse behaviours through empirical research (Sun, Rajiv and Chu 2016).

Segmentation of Fashion

Numerous variables have been used to segment consumers, such as consumer perceptions of personalisation, trends, purchase intention and fashion innovation

(Serrano-Malebrán and Arenas-Gaitán 2021: 36510). On the one hand, fashion involvement, innovativeness, self-expression through clothing and buying impulsiveness are some segment criteria used to identify consumers (Szczepaniak 2015: 1).

On the other hand, Mosquera *et al.* (2019) applied psychographic variables such as perceived usefulness, shopping enjoyment and social influence to determine fashion consumer segments based on omnichannel retail formats. The study resulted in segments such as reluctant omnishoppers, who do not appreciate the integration of channels; omnichannel enthusiasts, who enjoy the benefits of omnichannel shopping; and indifferent omnishoppers. Tran (2017) then segmented consumers according to their online promotional preferences, through four exogenous variables: ad avoidance, ad scepticism, personalised ads and ad credibility. The study resulted in three segments: Ad haters and consumers demonstrating high resistance to advertisements; second; ad lovers, consumers who showed a favourable attitude towards advertisements; third, Ad accommodators, which are consumers that do not demonstrate a particularly negative or positive attitude towards advertisements.

As with Tran (2017) and Mosquera *et al.* (2019), this research took the retail mix attributes and determined consumer segments based on variables outlined in the theoretical construct. Eventually, this research evaluated some critical success factors of retailing fashion design entrepreneurs, based on identified consumer segments within the retail mix. The analysis of diverse market conditions and consumer segments underscored the need for external support guidelines to be adaptable to different regional contexts. Considering their unique economic and cultural environments, this understanding was crucial for proposing effective policies in both South Africa and Germany.

3.3 THEORETICAL FRAMEWORK FOR CHAPTER 3

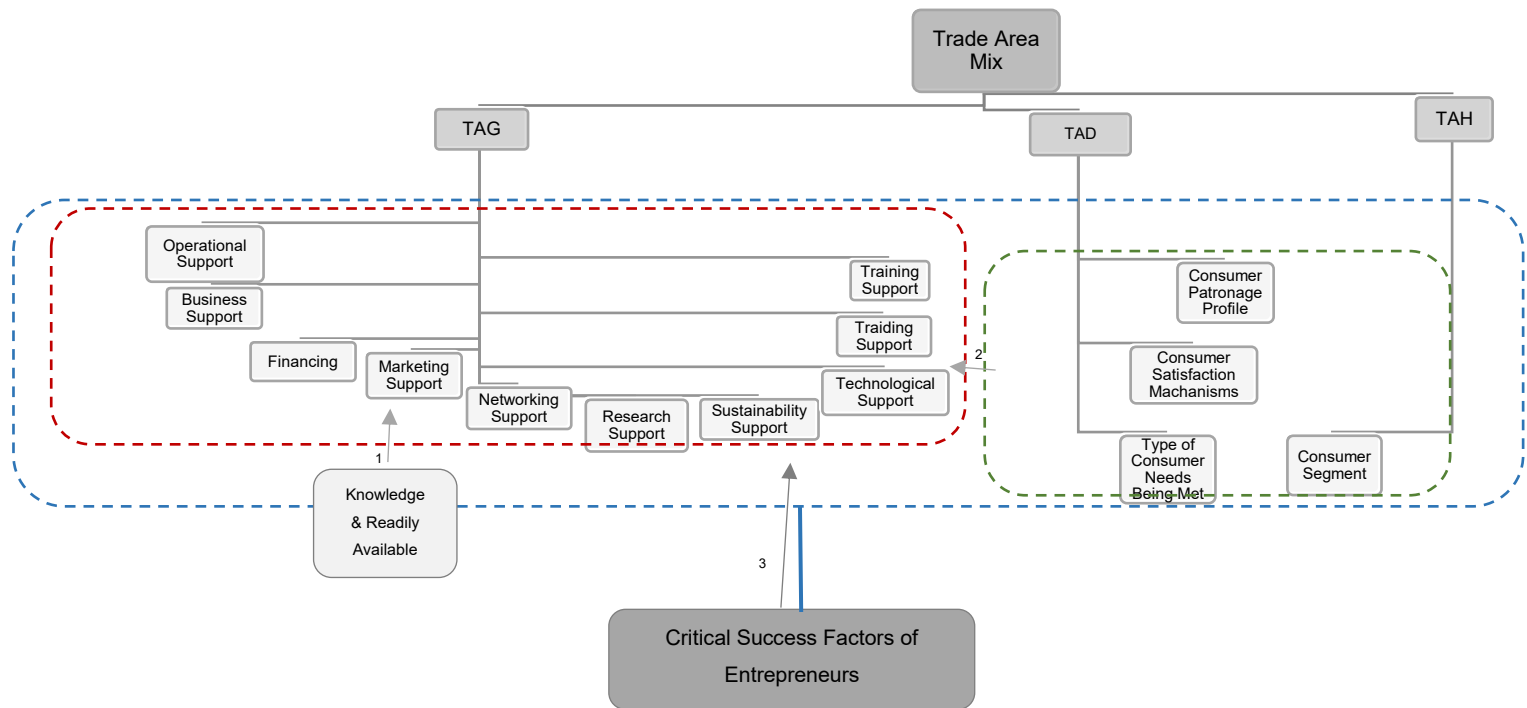


Figure 11: Qualitative Theoretical Framework with Fashion Designers

Source: Developed by Author

Figure 11 illustrates the theoretical framework for this chapter, anchored by the trade area mix, which outlines the TAG, TAD and TAH. Essentially, under TAG, the knowledge and the availability of organisations supporting retailing fashion design entrepreneurs were evaluated. The consumer needs of retailing fashion design entrepreneurs and the mechanisms implemented to meet consumer satisfaction and achieve patronage were explored with TAD. Under TAH, retailing fashion design entrepreneurs' understanding of their consumers' lifestyles and segments were assessed. All the constructs identified in this chapter were then evaluated to determine how they impact, influence, and support the critical success factors identified through the retail mix. Ultimately, this determined the relevant support structures or organisations required in Germany and South Africa to influence the critical success factors of fashion design entrepreneurs.

3.4 CHAPTER SUMMARY

This chapter examined the fashion industry context by integrating several theoretical frameworks to analyse the dynamics of fashion design entrepreneurship and the retail industry in which they operate. The discussion began with fashion design entrepreneurship, emphasising the journey from concept to market execution and identifying critical success factors such as innovation, responsiveness, and operational efficiency, mapped across the retail mix.

To evaluate these success factors, the balanced scorecard theory was introduced as a strategic tool, adapted to assess performance across financial, customer, internal process, and learning dimensions. This was followed by the retail strategy matrix theory, which provided a layered understanding of consumer behaviour (TAD), external support (TAG), and market conditions (TAH). The kano model was integrated to assess consumer satisfaction across retail mix attributes, while the shopping preference theory offered insight into how consumers choose fashion retailers.

Together, these frameworks established a detailed theoretical foundation for the empirical analysis that follows. Chapter 4 will outline the mixed-methods research design, building on the conceptual tools introduced in Chapters 2 and 3.

CHAPTER FOUR: METHODOLOGY

The previous chapters covered the literature that guide the empirical research and ground the findings. This chapter explains the systematic tools used to prepare for the empirical research. The general aim of this chapter was to provide the full context of the reasoning behind the choices made relating to the research design, paradigm, approaches, and research model, as well as the questionnaires, sample sizes and ethical considerations. First, the research design, which is related to the mixed method approach, and the research paradigms are discussed. Thereafter, the specifics of each research approach are addressed, starting with the quantitative strategy and ending with the qualitative approach. Finally, the ethical considerations for the empirical research are outlined. Figure 12 illustrates the entire contents of this chapter.

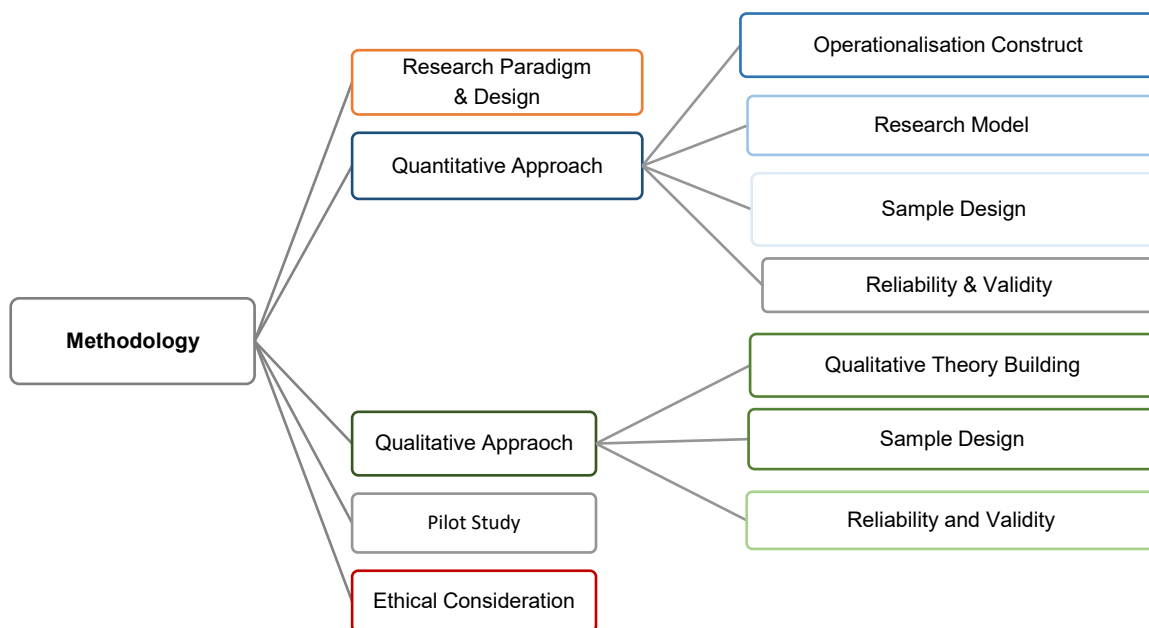


Figure 12: Chapter 4 Outline

Source: Developed by Author

4.1 RESEARCH PARADIGM AND DESIGN

A research paradigm or philosophy offers foundational information regarding the viewpoint and standpoint of the research to be undertaken and provides an overview of what the researcher views as reality, referred to as ontology; the nature of the knowledge created, referred to as epistemology; and the values of the research,

referred to as axiology (Davies and Fisher 2018: 21). The research design reviews the blueprints of this study to answer all the research questions (Bloomfield and Fisher 2019: 27).

As outlined in the introduction and the literature review, this study collected data from consumers and retailing fashion design entrepreneurs in Germany and South Africa. The quantitative data gathered through surveys identified consumer needs and critical success factors from a market perspective. The qualitative data, collected through in-depth interviews, provided insights into the experiences and needs of entrepreneurs regarding external support. This was conducted as this dual approach ensured the proposed policy guidelines for external support would be grounded in both consumer expectations and entrepreneurial realities.

The empirical research with consumers and retailing fashion design entrepreneurs was not approached as totally objective, instead it was viewed as intersecting constructs with objective realities, considering that some form of subjectivity shaped the reality (Muijs 2011: 6). Practically, this study involved the objective perspective from consumers to guide the subjective exploration with retailing fashion design entrepreneurs. These respondents and participants provided insights into their behaviours, preferences, and experiences within the fashion industry. This paradigm approach is called post-positivism, which believes there is a single reality that is unknown, which is the critical realist ontology, and it also leads to the modified objectivist epistemology, where pure objectivity is impossible, thus, characterised as both quantitative and qualitative research (Davies and Fisher 2018: 22).

The application of both qualitative and quantitative methods in one study is usually referred to as mixed research methods (Edmonds and Kennedy 2017: 2). Mixed analysis was applied to this study, as both quantitative and qualitative viewpoints have previously been proven as critical to the development of research questions in business management studies (Molina-Azorin 2018: 3). This study's first two research questions; (i) What do consumers need from retailing fashion designers for continued patronage?, and, (ii) What are the critical success factors of retailing fashion design entrepreneurs? were researched through a quantitative research design. Following this, the final questions: (iii) What type of external support is required for retailing

fashion design entrepreneurs?, and (iv) What do retailing fashion designers need from external support to achieve critical success factors? were addressed through a qualitative research design.

This explanatory design was two-phased, starting with collecting and analysing quantitative data, then proceeding to qualitative data to elaborate and explain significant quantitative results (Fetters 2020: 5). This two-phase approach was beneficial, as it assisted in defining the requirements of external support from retailing fashion design entrepreneurs' perspective, based on the findings of what consumers deem critical from fashion retailers (Edmonds and Kennedy 2017: 2). The research was thus conducted sequentially, with no dominant paradigm, where qualitative research was used as a complementarity tool to elaborate on the quantitative data initially collected. Ultimately, the quantitative research was used as a development tool, where the findings were used to inform the qualitative research, to finally answer the main research question (DeCuir-Gunby and Schutz 2017: 4). Figure 13 illustrates the explanatory sequential design followed by this study.



Figure 13: Explanatory Sequential Design

Source: DeCuir-Gunby and Schutz (2017: 7)

Cross-Sectional Design

Time is an essential aspect of every study, whether conducted longitudinally to measure the discrepancy of the results at multiple periods or conducted cross-sectionally by collecting data at a specific point in time, without considering the impact of time (Pooe 2020: 46). By definition, cross-sectional design determines the general research view of the situation at a specific period, to determine the research results of a particular study (Kumar 2014: 368).

Cummings (2017: 2) summarised the characteristics of cross-sectional studies by stating that:

- Cross-section design is used to collect data at a particular period in time without manipulating variables. For instance, this study collected data from consumers and retailing fashion design entrepreneurs to provide descriptive statistics of that population from July 2023 to December 2023.
- Ideally, cross-sectional design is relevant for examining and comparing variables across multiple subgroups, similar in other aspects, as in the case of this study. The variables of this study were reviewed and compared between consumers and retailing fashion design entrepreneurs in Germany and South Africa.
- Commonly, cross-sectional design assists with identifying patterns and prevalence of populations and subgroups' outcomes at a particular time. In application to this study, identifying patterns related to the theories discussed amongst consumers and retailing fashion design entrepreneurs was essential in determining critical success factors for external support, to implement to support retailing fashion design entrepreneurs.

Overall, the cross-sectional study design offered a practical and efficient approach for comparing critical success factors among retailing fashion design entrepreneurs in Germany and South Africa, providing valuable insights into the dynamics of the fashion industry within each country.

4.2 QUANTITATIVE APPROACH

With the consumer-based empirical research, quantitative research was used as the fundamental method to reduce a large amount of data into manageable areas, draw conclusions, discover insights regarding patterns, and identify differences between groups, as well as examine associations or relationships between groups, and make predictions regarding the data (Scherbaum and Shockley 2015: 4). Generally, quantitative research has been defined as deductive, objective and general, meaning observations were used to test theories, the researcher's impact on the results was minimised and the data collected could have been applied to a wide variety of settings (Morgan 2014: 10).

In the case of this research, observations through surveys were used to test the retail mix framework, consumer preferences were analysed objectively within the context of the retail mix framework, and the data collected could be applied to a wide variety of settings related to retailing fashion design entrepreneurs. Ultimately, the goal of the empirical data collected from consumers was to deduce what consumers value the most within the retail mix, to patronise retailing fashion design entrepreneurs better. Moreover, that information was then used as underlying critical success factors.

4.2.1 Operationalisation of Theoretical Construct (Variable Operationalisation)

Further definitions of quantitative research include variables, regarded as the “building blocks” of quantitative research, while variable operationalisation entails data (or theory) processing, to ensure the variables are measurable statistically (Babones 2014: 2). Variables are defined as the attributes of the theory used (in this case the retail mix) that can assume different measures and may be distinguished as independent and dependent variables (Scherbaum and Shockley 2015: 3).

The independent variables in this study were the 6-Ps of the retail mix; as they were presumed to influence the outcome of critical success factors for retailing fashion design entrepreneurs and, consequently, of the external support, which implied the dependent variables were the external support requirements influenced by the critical success factors, suggesting a cause-and-effect relationship between the retail mix, critical success factors and external support (Aneshensel 2013: 3).

4.2.1.1 Independent Variables

Referencing the literature review and the theoretical framework, this section highlights and further justifies the measured independent constructs, summarised in table 4.1. It is important to note the framework of the theoretical constructs was based on what the researcher deemed pivotal for this research; thus, this section serves to justify those choices. Finally, with each identified construct, a hypothesis was specified.

Table 4.1: Operationalisation Construct

Quantitative: Survey				
Retail Mix Constructs/Variables	Dimensions	Operationalisation	Measurement	Reference
Place (Omnichannel)	Omnichannel Perceived Usefulness (OPU)	1. Being able to use multiple channels throughout the customer journey allows me to purchase fashion and clothing faster. 2. The opportunity to use different channels like the internet, shops or shopping apps while searching for and buying fashion and clothing is useful for me. 3. The opportunity to use different channels like the internet, shops or shopping apps while searching for and buying fashion and clothing makes my life easier.	7-point scale, from "I strongly disagree" to "I strongly agree"	Mosquera et al. (2019)
	Omnichannel Shopping Intention (OSI)	1. In certain situations, I can imagine using different channels like the internet, physical shops or shopping apps that a fashion retailer offers me. 2. I would purchase fashion products from the retailers' website using my mobile phone if I cannot find the correct size or colour at the store. 3. I would search for relevant information using my mobile phone while shopping for fashion at the store.	7-point scale, from "I strongly disagree" to "I strongly agree"	Ryu (2019:18)
	Omnichannel Patronage Intention (OPI)	1. I will continue to patronise retailers which offer both online and in-store services at the same time for fashion and clothing purchases. 2. I will recommend the use of retailers who offer both online and in-store services at the same time to others for fashion and clothing purchases. 3. I would like to use retailers which offer both online and in-store services at the same time in the future to purchase fashion and clothing.	7-point scale, from "I strongly disagree" to "I strongly agree"	Banik (2021: 6)
	Kano Model Questions (KMO)	1. Overall, how do you feel when you can shop for your fashion items from multiple retail channels during one shopping trip? 2. Overall, how do you feel when you cannot shop your fashion items from multiple channels during one shopping trip?	Kano Model	Matzler et al. (1996)
Product	Authenticity (A)	1. I value fashion made by traditional techniques. 2. Craftsmanship is very important in fashion. 3. Handcrafted fashion is more valuable than mass-produced ones.	7-point scale, from "I strongly disagree" to "I strongly agree"	Jung and Jin (2014; 2016b; 2016a)

	Localism (L)	1. I prefer buying fashion made locally to fashion manufactured overseas. 2. I believe fashion made of locally produced materials is more valuable. 3. We need to support locally made fashion brands.	7-point scale, from "I strongly disagree" to "I strongly agree"	
	Exclusivity (Ex)	1. Limited edition fashion holds special appeal for me. 2. I am very attracted to rare fashion products. 3. I enjoy having fashion products that others do not.	7-point scale, from "I strongly disagree" to "I strongly agree"	
	Functionality (F)	1. I often enjoy wearing the same fashion items in multiple ways. 2. I tend to keep fashion products as long as possible rather than discarding them quickly. 3. I prefer simple and classic designs.	7-point scale, from "I strongly disagree" to "I strongly agree"	
	Equity (EQ)	1. Fair compensation for fashion product producers is important to me. 2. I am concerned about fair trade or ethical labels when I buy fashion. 3. I am concerned about the working conditions of producers when I buy fashion.	7-point scale, from "I strongly disagree" to "I strongly agree"	
	Kano Model Questions (KMS)	1. Overall, how do you feel when you can shop for fashion products from fashion designers in retail shops. 2. Overall, how do you feel when you cannot shop for fashion products from fashion designers in retail?	Kano model: from "I like it" to "I dislike it."	
Pricing	Willingness to pay Price Premium	1. Buying fashion products seems smart to me, even if they cost more. 2. I would still buy fashion products that are important to me even if other brands reduced their prices. 3. I am ready to pay a higher price for fashion products that are important to me.	7-point scale, from "I strongly disagree" to "I strongly agree"	Jung and Jin (2016)
	Kano Model Question (KMW)	1. Overall, how do you feel when you pay price premiums for fashion designer products in retail? 2. Overall, how do you feel when you do not have to pay price premiums for fashion designer products in retail?	Kano model: from "I like it" to "I dislike it."	Matzler <i>et al.</i> (1996)
Promotion	General Fashion Advertising Involvement (GA)	1. Advertisements about fashion are of no concern to me. 2. I pay attention to advertisements about fashion (in general). 3. I become completely involved, absorbed or engrossed with advertisements about fashion.	7-point scale, from "I strongly disagree" to "I strongly agree"	O'Cass (2000)

	Social media Usage (SM)	1. Social media networks are a good source to inspire my fashion purchases. 2. When I see fashion on social media networks, I often search for it online to purchase. 3. When I see fashion on social media networks, I often search for it offline to buy it. 4. Sometimes, I have seen fashion from one of my social media contacts, and I have felt the impulse to buy it (intention). 5. Sometimes, I feel attracted to fashion shared by my social media contacts.	7-point scale, from "I strongly disagree" to "I strongly agree"	Aragoncillo and Orus (2018)
	Social Advertising	1. Social media adverts are a good source of fashion information. 2. Social media adverts provide updated information about fashion products. 3. Social media adverts are a convenient source of fashion information.	7-point scale, from "I strongly disagree" to "I strongly agree"	Rehman and Al-Ghazali (2022)
	Kano Model Questions (KMM)	1. Overall, when you catch or see a fashion promotion (e.g. advertising), how do you feel? 2. Overall, when you do not catch or see a fashion promotion (e.g. advertising), how do you feel?	Kano Model: from "I like it" to "I dislike it"	Matzler <i>et al.</i> (1996)
Presentation	Visual Merchandising (onsite)	1. An attractive store interior motivates me to buy fashion. 2. I feel compelled to buy fashion when I see an interesting window display. 3. I tend to be tempted by in-store displays to make unplanned fashion and clothing purchases.	7-point scale, from "I strongly disagree" to "I strongly agree"	Anić <i>et al.</i> (2018)
	Online Visual Merchandising	1. An attractive online store motivates me to buy fashion. 2. I feel compelled to buy fashion when I see an interesting online store. 3. I tend to rely on how fashion is displayed online when I make decisions to purchase from an online store.	7-point scale, from "I strongly disagree" to "I strongly agree"	
	Kano Model Questions (KMV)	1. Overall, how do you feel when you see a fashion display and presentation? 2. Overall, how do you feel when you do not see a fashion display and presentations?	Kano Model: from "I like it" to "I dislike it"	Matzler <i>et al.</i> (1996)
Personnel	Personal Interaction	1. I like interacting with retail personnel when shopping for fashion. 2. Personal contact with retail personnel is important to me when I shop for fashion. 3. I like to talk with retail personnel when I shop for fashion.	7-point scale, from "I strongly disagree" to "I strongly agree"	Riquelme and Román (2014)

	Kano Model Questions (KMI)	1. Overall, how do you feel when you receive personal interaction from fashion retailer personnel? 2. Overall, how do you feel when you do not receive personal interaction from fashion retailer personnel?	Kano Model: from "I like it" to "I dislike it."	Matzler <i>et al.</i> (1996)
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Source: Developed by Researcher

i. Place

Place, otherwise referred to as fashion retail in this study, was viewed from the omnichannel perspective, as this is becoming the expectation within the fashion industry (Business of Fashion and McKinsey 2022). *Perceived usefulness* of omnichannel was the first dimension considered to measure fashion retail. Kopot and Cude (2021: 6) applied a similar dimension as *perceived usefulness* in their study, establishing a sustainable omnichannel strategy for fashion department, and they termed it *behavioural beliefs*, which was related to omnichannel fluency. In other words, the dimension focused more on how users evaluated the experience of omnichannel retailing, instead of how consumers perceived the omnichannel functions.

With this study, the experience of consumers with omnichannel retailing was not as important as the perceived experience, as the first objective was to gauge consumers' needs for patronage towards retailing fashion design entrepreneurs instead of evaluating consumers' actual experiences with omnichannel retailing (which could have potentially excluded several respondents). Thus, the operationalisation approach of Mosquera *et al.* (2019) was found more suitable for this study, as these authors defined the dimension as "the degree to which consumers perceive the use of different channels and/or technologies during the customer journey as rewarding them when they are buying clothes by streamlining the shopping process." In other words, *perceived usefulness*, in this case, evaluated whether omnichannel retailing was expected to be efficient by consumers (Kopot and Cude 2021: 3). This indicates that *perceived usefulness* arises from instrumental beliefs or object-based beliefs (instead of behavioural beliefs), which in turn, drive intention (Juaneda-Ayensa, Mosquera and Sierra Murillo 2016: 2; Kopot and Cude 2021: 3).

Naturally, *omnichannel shopping intention* became the second dimension, which considered the future plans of consumers to shop for retailing fashion design entrepreneurs using multi-channels, simultaneously (Ryu 2019: 18). The motivating factors such as technological innovativeness, fashion purchase involvement and innovativeness, applied by Ryu (2019) in the same study, were not considered for this study, which concentrates on whether omnichannel retailing impacted consumers' patronage towards retailing fashion design entrepreneurs, instead of the reasons behind the usage of omnichannel retailing. As a result, *omnichannel patronage intention* developed into the third dimension, which measured the intended level of consumer involvement in engaging with multi-channel or "phygital" shopping options (Banik 2021: 6).

In other studies, the constructs applied were either focused on processes, perceived risk, consumer innovativeness, and consumer preferences, as well as consumer beliefs, and omnichannel definitions, through systematic literature reviews or products in omnichannel retailing (Cho and Workman 2011; Beck and Rygl 2015; Ryu 2019; Banik 2021; Kopot and Cude 2021; Cattapan and Pongsakornrunsilp 2022).

With all the dimensions applied, the indicators were specially modified to measure fashion retail and reflect the omnichannel shopping environment for fashion and clothing. Taking into account the above literature, the following hypothesis was formulated:

H1: Omnichannel retailing positively influences consumer patronage towards fashion retail places.

ii. Product

As this study was focused on retailing fashion designers, considered to be closely linked to slow fashion, the dimensions considered for fashion products were based on slow fashion product attributes, which included authenticity, localism, exclusivity, functionality and equity (Jung and Jin 2014; Jung and Jin 2016b, 2016a), discussed and justified in more detail in chapter 2.

Das *et al.* (2022: 2) argued that luxury consumption was closely linked to retailing fashion design entrepreneurs and highly depended on the product's authenticity. Accordingly, the following hypothesis was proposed:

H2a: Authenticity positively influences consumer patronage towards slow fashion products.

Conversely, DeLong *et al.* (2013: 62) explained, "Designing local is about developing greater sensitivity to place and scale where communities are sustained, and jobs are supported. Living and working in one place can bring new perspectives and practical solutions." This meant communities could potentially place a high value on locally produced products, which resulted in the following hypothesis:

H2b: Locality positively influences consumer patronage towards slow fashion products.

Exclusivity, however, has previously been linked to scarcity. The scarcity principle of supply-and-demand states that consumer preference for the object of scarcity tends to increase, and when the scarcity is due to limited production (as in the case of retailing fashion design entrepreneurs), consumers may perceive the product as exclusive with limited availability, which in turn, signals the status of the consumer (Bhaduri and Stanforth 2016: 474). Considering this principle, the following hypothesis was formulated:

H2c: Exclusivity positively influences consumer patronage towards slow fashion products.

Jung and Jin (2016b) argued the products must also be functional to support exclusivity. Which meant "maximising product lifespan and efficiency for a sustainable environment" (Blas Riesgo *et al.* 2022: 5). This signified functionality was closely related to the longevity and durability of fashion products, potentially appealing to consumers for sustainability or economic reasons (Jung and Jin 2014: 510), which leads to the following hypothesis:

H2d: Functionality positively influences consumer patronage towards slow fashion products.

Generally, equity informs all other dimensions through product certification and quality labelling systems (such as fairtrade), by addressing consumers' ethical, environmental, quality, and localism concerns, along with general fairness associated with the production of fashion (Sorinel 2010; Saicheua *et al.* 2011; Bhardwaj 2020; Peters and Simaens 2020; Eberhardt *et al.* 2021). Essentially, the dimension equity indicated consumers were considerate of fair labour practices and fair compensation of the producers making the clothing when selecting fashion products, with information usually shown on product labels and certifications (Jung and Jin 2016a: 412), resulting in the following hypothesis:

H2e: Equity positively influences consumer patronage towards slow fashion products.

Other researchers that have applied the dimensions mentioned above include Şener *et al.* (2019), who explored sustainable dressing and consumer value perception on slow fashion. Sobreira, Silva and Romero (2020) used these dimensions to research the influence of slow fashion consumption in Brazil, while Chakraborty and Sadachar (2023) examined the COVID-19 impacts in slow fashion. Comparative to this study, Blas Riesgo *et al.* (2022) investigated authenticity, localism, exclusivity, and functionality, as well as equity, to similarly analyse consumers' inclination towards sustainability.

Authenticity, localism, exclusivity, and functionality, in addition to equity, were deemed the most suitable dimensions for this study, as they had been widely used and accepted as measurements for quantitative slow fashion research studies. Moreover, quantitative slow fashion and clothing research focused on product attributes was limited, with the majority research being exploratory, qualitative and introductory research, with vague distinctions for measurable dimensions (Pookulangara and Shephard 2013; Leslie *et al.* 2014; Štefko and Steffek 2018; Brewer 2019; Domingos, Vale and Faria 2022).

iii. Price

When considering the pricing categories summarised in chapter 2 and the findings that state consumers interested in slow fashion may perceive higher value towards fashion products (Jung and Jin 2016b: 6), this study found it fitting to allocate

consumers into value-premium price groups, thus, focusing on higher price points for retailing fashion design entrepreneurs.

Unlike Huang (2018) and Kovač *et al.* (2021), who focused on either service attributes or specific product attributes, such as quality linked to the willingness to pay price premiums, this study chose to focus on the inclination of consumers to pay price premiums for holistic fashion products of their choice. Considering that price measures already focused on slow fashion (Jung and Jin 2016b: 9), they were the best adaptation for this study. In comparison, the measures applied for this study are similar to previous research assessing the consciousness of status in fashion clothing with consumers (O'Cass and Siahtiri 2014: 291). In view of the link between premium prices and slow fashion products, the following was hypothesised:

H3: Paying price premiums does not negatively impact consumer patronage towards fashion.

iv. Promotion

Fashion promotion research has been regarded as scarce, with the focus predominantly on the broad topic of fashion marketing, and the primary consideration being fashion advertising and extensive literature focused on the involvement theory (Taylor and Costello 2017: 4). Following the approach used by O'Cass (2000: 548), involvement in the context of this study evaluated how consumers interacted and engaged with fashion advertising. This study chose to use dimensions and indicators focused on consumer involvement towards fashion advertisement, instead of constructs focused on the diffusion of innovation, theory of social comparison or theory of narrative transportation, which are theories that examine specific usage psychological patterns/profiles of consumers engaged in fashion advertising, instead of merely evaluating the overall importance of fashion advertising (Taylor and Costello 2017: 5).

First, generalised fashion advertising was included to evaluate consumers who did not interact with social media advertising, accounting for 41 percent consumers (Chaffey 2023). As assessing the importance of fashion advertising was the primary objective, the dimensions operationalised had to quantitatively measure the response of consumers toward fashion advertising, and as mentioned, *fashion advertising*

involvement was one of the dimensions found that were closely linked to the study objectives (O'Cass 2000: 560). Which led to the first part of the fourth hypothesis:

H4a: Promotion in the form of general fashion advertising positively influences consumer patronage towards fashion.

Consumer involvement with online channels was found to have increased and was further accelerated by the COVID-19 pandemic (Pathirana and Ranaweera 2023: 218), which then led to considering online fashion promotion approaches, found to be dominated by social media, particularly for retailing fashion design entrepreneurs (Ahmad *et al.* 2015; O'Hare *et al.* 2018; Chu and Seock 2020; Rienda *et al.* 2020). With the literature mentioned in mind, the second part of the fourth hypothesis had to consider social media advertising:

H4b: Promotion in the form of social media involvement positively influences consumer patronage towards fashion.

v. Presentation

With fashion presentation, visual merchandising was considered the fundamental practice facilitating retail atmospherics, appearance and arrangements (Gudonavičienė and Alijošienė 2015: 639; Basu *et al.* 2022: 397). Accordingly, the dimensions chosen to operationalise fashion presentation needed to measure the impact of visual merchandising on consumer patronage towards fashion. Anić *et al.* (2018: 553) concentrated on overall consumer responses towards visual merchandising, which also related to window display, store interior, promotional signage, and floor merchandising, as well as in-store displays. The particular measurements were further developed to measure online visual merchandising, as this study incorporated omnichannel retailing, including physical and digital stores (Beck and Rygl 2015: 172).

Other research, in contrast, which focused on visual merchandising, was qualitative and/or evaluated specific display aspects and how they impacted consumer' emotions, value perceptions and behaviour (induced by distinctive visuals), which was not the focus of this study (Poncin and Ben Mimoun 2014: 855; Jakhar *et al.* 2020: 2769). Ultimately, the following was hypothesised:

H5: Presentation in the form of visual merchandising positively influences consumer patronage towards fashion.

vi. Personnel

In measuring the impact of personnel on consumer patronage towards fashion, the operationalised dimension was *personal interaction*. Riquelme and Román (2014: 145) measured the impact of personal interaction to test consumer behaviours of consumers who had purchased high-involvement products online or through the traditional channel, which is closely related to the product attributes of this study. Personal interaction evaluates how retailers engage and drive consumer purchasing decisions with their personnel, and with this, other sub-dimensions include personal attention, readiness to help, politeness and punctual service (Terblanche 2017: 2; Htwe 2020: 62). However, within the scope of this study, only the primary dimension (personal interaction) could be measured and was deemed as a sufficient starting point. Nonetheless, should personal interaction be found as one of the critical success factors with consumers, it would be recommended the sub-dimensions mentioned be considered for future studies.

Ramayah and Yeap (2013: 46) conducted research measuring relationship quality within clothing retail stores, concentrating on the knowledge level of in-store personnel to assist consumers, while other studies focused on employee behaviour and knowledge when interacting with consumers (Ivanauskiene and Volungenaite 2014: 117; Ma and Kim 2021: 841). However, this study measured the general feeling towards personal interaction regardless of the service quality. With that in mind, the following was hypothesised:

H6: Personal interaction positively influences consumer patronage towards fashion.

vii. Kano Modelling

This section elaborates on how the kano model was operationalised, instead of defining and explaining the model, as discussed in chapter 3. As mentioned in this study, the kano model was integrated with the retail mix framework to determine the shopping preferences of consumers.

In constructing 'kano questions', Matzler *et al.* (1996: 8) outlined that to determine the importance of a product feature (in this case, retail mix features), the questions needed to be formulated in a manner in which the consumers may respond in one of the five scales. In this regard, the kano questions for this study required the respondents to answer questions containing one functional and one dysfunctional question in one of the five scales below (Atlason *et al.* 2018: 461). For example, when the respondents were asked about the "place" they purchased their fashion, two questions were asked:

- Functional question: *Overall, how do you feel when you can shop for your fashion items from multiple retail channels during one shopping trip?*
- Dysfunctional question: *Overall, how do you feel when you cannot shop for your fashion items from multiple channels during one shopping trip?*

The respondents then needed to detail their answers in one of the five scales (reversed in the context of this study, to maintain scale consistency throughout the questionnaire): (1) I dislike it that way, (2) I can live with it that way, (3) I am neutral, (4) I like it that way and (5) It must be that way (Ek and Çıkış 2013: 402). The complete questionnaire is detailed in Appendix C.

It is important to note there are different methods to measure the kano model as it evolved, with weaknesses and complexities from each model (Shahin *et al.* 2013; Madzík 2016). Between the "penalty-reward contrast analysis" method (initially developed to identify the value-enhancing factors of product/service) and the "importance grid" method (focused on the crucial attributes of products and services in explicit and implicit terms), the "penalty-reward contrast analysis" method was a close consideration for this study, as it would have maintained the 7-point scale with the use of the regression analysis, however, the standardised regression coefficient would have caused technical issues, as unequal distribution of the variables would have skewed the results (Mikulić and Prebežac 2011: 52). Eventually, after careful consideration, the initial kano model was found appropriate as an addition to this study to test the retail mix, as it was deemed the most straightforward to use, with unambiguous interpretation (Madzík 2016: 393).

Several researchers have integrated the kano model in various ways, thus refining it in combination with other models. These models include: the importance-satisfaction model (I-S Model), which addresses quality attributes; the importance-of-attribute-performance model (IPA model), diagnosing the skills and characteristics of skills quality; the customer-relationship-management model (CRM model), managing the relationship with customers by enabling information technology, and; the quality-function-deployment model (QFD model), which integrates the voice of the customer to improve product/service quality (Paraschivescu and Cotirlet 2012: 120-121; Ji *et al.* 2014).

Additionally, the balanced scorecard theory, applied in the results of this study, was previously integrated into the kano model for analysis purposes, to introduce new strategies to improve services offered to patients in hospitals (de Vasconcelos *et al.* 2022: 218). Applying a similar approach, this study integrated the balanced scorecard theory (discussed in chapter 3) to introduce new strategies for external support, based on the operationalised retail mix and the kano model.

4.2.1.2 Research Model

The outlined hypotheses provided information on how the factors from the retail mix influence consumer patronage toward fashion design entrepreneurs in retail. In summary, the research model (figure 14) illustrates how the different activities link into a unified whole to achieve the ultimate research goal (Woodwell 2014: 2).

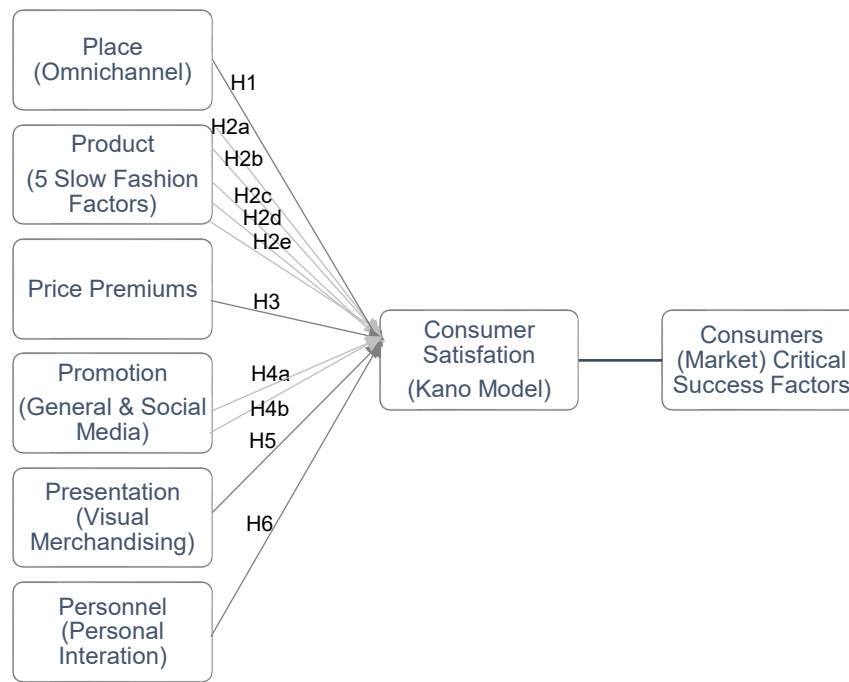


Figure 14: Research Model

Source: Developed by Author

4.2.2 Quantitative Sample Design

Sample design of a population is vital, as it significantly influences the modification of the results, which may lead to empirical and theoretical distortion (López-López, Iglesias Antelo and Sousa 2020: 492). This section aimed to outline this study's sample design and justify the choices made related to the sampling.

4.2.2.1 Target Population

This study concentrated on consumers based in Germany and South Africa, over the age of 18 years, who met the quota outlined in table 4.2. The purpose of the target population is to draw out a sample representative of a population, suitable for a study (Creswell and Creswell 2017: 206). By definition, the target population comprised consumers interested in fashion clothing, who used fashion as a tool for dressing (Rahman *et al.* 2014). The target population researched had online access and was segmented according to sociodemographic factors, as people intentionally selected clothing based on different types of social factors (McDermott and Pettijohn II 2011: 64), which included age, gender, education level, and income, as well as location (Dobronte 2013).

4.2.2.2 Sampling Methods

Bearing in mind the specific target population, this study ensured that different subgroups from Germany and South Africa were represented in the sampling method, with their respective population ratio; this sampling method is called quota sampling (Muijs 2011: 5). This is a form of nonprobability sampling, which divided the population into subgroups, stratifying the population into specified groups, according to their characteristics, then calculating the proportion and sample size for each group, after which a quota was selected for each sub-group (Coleman and Multon 2018: 2).

Random selection is regarded a significant element when conducting survey research, because it safeguards the generalisation of the findings (Edmonds and Kennedy 2017: 2). Accordingly, the simple random sample formula was applied to generate a sample size, resulting in setting a total sample size of 550 participants for each country. Equation (1) explains how the targeted sample was initially established.

$$n = \frac{\sigma^2 \cdot z^2}{E^2}$$

(Equation 1)

- $\sigma = 1$; $z = 1,96$ (because $\alpha = 0,05$, $1 - \alpha = 0,9545$) ; $E = 0,1 \rightarrow n = 384,16$ (rounded up to 400)
- Failure rate consideration: $n \cdot 0,375 = 150 \rightarrow n + 150 = 550$

A quota sample was then determined for each country, based on the results of the simple random sample calculations, as illustrated in Table 4.2.

Quota Sample Germany

The sampling approach for Germany was based on the population's income, gender and age. This decision was made, because this is how the demographics in Germany were separated, thus making the initial population data easily accessible and dependable (Dobbelstein and Lochner 2023; Statista 2023: 2266).

Table 4.2: Quota Sampling Germany

Criteria	Target (%)	Population (N)	Sample (n)
Male	48,9	35 126 124	269
Female	51,1	36 516 629	281
Diverse / not specified	0	0	0
18 – 24	11,4	8 144 569	63
25 – 34	14,3	10 237 266	79
35 – 49	21,7	15 527 777	119
50 – 64	26,2	18 786 179	144
65+	26,4	18 946 962	145
Less than € 1,250	15,4	6 209	85
€ 1,250 to 2,000	19,7	7 983	108
€ 2,001 to 3,000	23,6	9 528	130
€ 3,001 to 5,000	26,7	1 0798	147
€ 5,001 and more	14,6	5 914	80

Quota Sampling South Africa

In South Africa, the approach was different, as the segmentation approach was initially through living standard measures (LSM), a socioeconomic segmentation system commonly used for market research to analyse demographics by dividing them into groups of 10, classifying households and individuals into different categories or segments based on a combination of factors such as income, education, housing, and ownership of assets (Ntloedibe and Ngqinani 2020: 1).

On the one hand, some researchers argue LSM is outdated and researchers should move towards more current segmentation methods in South Africa, such as Socioeconomic Measures (SEM) (Langschmidt 2017). On the other hand, other researchers state alternative segmentation measures other than LSM and SEM should be considered, as SEM appear to be the continuation of LSM (Muller 2017). After carefully considering the two segmentation options in South Africa, it was important for the researcher to obtain a specific database of respondents (to meet the quota), which was only commercially available for LSM and not for SEM. Nonetheless, the researcher decided to transfer the theoretical data available for SEM to LSM quotas, in other words, the data were collected from commercially available LSM demographics but were based on the SEM quota (BRCSA 2018).

In South Africa, the lower LSM (1-4) have been considered as segment groups representing consumers in rural areas with lower incomes and relying on basic commodities for survival, while the higher LSM (5-10) are regarded as urbanised and more financially stable consumers (Mason, Corbishley and Dobbelstein 2022). With this study, however, the researcher decided to work with LSM 7-10 (SEM 7-10), which represents households from the upper-middle class to households with levels of affluence, access to a range of consumer goods, services, a high level of education and who live in metropolitan, suburban or urban areas, with comfortable lifestyles (BRCSA 2018). This paper, therefore, deems the urbanised population (LSM 7-10) in South Africa to be individuals who would possibly consider purchasing clothing from retail fashion designers.

Table 4.3: Quota Sampling South Africa

Criteria	Target (%)	Population (N)	Sample (n)
LSM 7	31	3 400 000	170
LSM 8	24	2 700 000	132
LSM 9	21	2 500 000	116
LSM 10	24	2 800 000	132

4.2.3 Quantitative Reliability and Validity

In this quantitative section, reliability was assessed by examining the relationship between variances and correlations to ensure attainment of the most desirable reliability coefficient, ranging from 0.6 (considered moderate) to values closer to 1.0, indicating high reliability (Ruel, Wagner and Gillespie 2016: 5). This assessment employed the internal consistency reliability strategy, involving the division of a single test into two equivalent or parallel halves, through implementation of Cronbach's Alpha (Suter 2012: 14).

Validity was established by ensuring the data collection instrument for consumers measured the relevant objectives and addressed the research questions effectively (Watson 2015: 45). Construct validity was employed, with this study utilising the nomological network, based on measures from previous studies (Maul 2018: 5). Additionally, Exploratory factor analysis (EFA) was conducted to assist in evaluating the reliability and validity of measurement instruments by analysing the underlying

factor structure of a set the observed variables (Watkins 2018: 219). For instance, EFA has been effectively used to validate scales in tourism studies, demonstrating strong reliability coefficients and confirming the scales' capacity to measure latent constructs accurately (Kolawole 2019: 62).

4.3 QUALITATIVE APPROACH

The nature of qualitative research is to formally organise discussions instead of investigating the meanings people bring into a phenomenon (Flick 2018: 1). By definition, qualitative research focuses on subjects' experiences in their natural settings and applies nonmathematical data analysis processes (Su 2019: 3). In practice, this section of qualitative research aimed to "make visible and unpick the mechanisms which link particular variables, by looking at the explanations, or accounts, provided by those involved" (Barbour 2014: 15). In the case of this study, the "particular variables" are the 6Ps and "those involved", are retailing fashion design entrepreneurs.

It is important to note qualitative research does not have a singular approach but rather, a heterogeneous set of practices (Gehman *et al.* 2017: 284). Essentially, qualitative research is inductive by nature, which means the research data are followed by a theory (Saunders, Lewis and Thornhill 2015: 20). One popular inductive approach applied is grounded theory, which aims to deliver inductive enquiry by generating a new theory (Elliott and Higgins 2023: 165). In other words, grounded theory research creates new theories, instead of using existing theories as a guiding tool for the study (Klem *et al.* 2022: 4). Moreover, grounded theory aims to illustrate the relationships among the emerging concepts (Gehman *et al.* 2017: 286), while this study aimed to demonstrate the relationship amongst existing concepts for improvement and development, to ensure greater success for retailing fashion design entrepreneurs.

Inductive research is, nevertheless, not without criticism or weaknesses related to the processes of justifying knowledge (Bendassolli 2013: 3). Considering the post-positivism approach of this study, it was then imperative to work with a foundational theory that assisted in revealing the predisposition of the study, which would, in turn, facilitate the data coding and interpretation processes (Collins and Stockton 2018: 1).

The goal was thus to elaborate on existing theories, by combining constructs and underlining theoretical components that explained the link between the phenomena of this study, denoting this qualitative section as merely not theory building, but, involved a deductive approach of following theory (Gehman *et al.* 2017: 287; Bergdahl and Bertero 2023: 3; Pearse 2019b: 264).

4.3.1 Qualitative Theory Building

“Study with a centralised theory can be highly exploratory” (Collins and Stockton 2018: 9), by focusing on important, relevant, and consistent phenomena, while maintaining the sensitivity of balancing theoretical rigour with contextual detail (Pearse 2021: 96). Therefore, this section aimed to illustrate how the theory served as a departure point for the data collection processes (Pearse 2019b: 264). Based on the paradigm and disposition of this study, a generic qualitative approach was applied, which afforded strength in its flexibility, accommodating the deductive process and mixed-method research (Klem *et al.* 2022: 3). With the application of the generic qualitative approach, the combination of thematic analysis (focused on identifying themes in data) and pattern-matching technique, focused on identifying patterns or themes in data and then comparing them with patterns in literature, requiring the development of propositions that would be empirically researched (Pearse 2019a: 147). As the qualitative approach in this study is deductive, novel propositions were developed before the data analysis process (instead of after the data analysis) to advance the empirical research and convey suggestive relationships identified in the literature that were yet unexplored (Johnson 2019: 19). By definition, the suggested propositions could not be quantifiable, but were qualitative by nature and represented the nature of relationships between various concepts identified in the literature (Pearse 2019a: 147).

The theory applied to justify the conceptualisation of the questionnaire, and essentially of knowledge, was the trade strategy matrix, which is a theory that combines the retail mix and the trade area mix (as discussed in chapter 3). This section justifies and outlines the foundational knowledge that built the questionnaire with retailing fashion design entrepreneurs. The combination of the trade strategy matrix and the literature supporting the theory were utilised to reveal the predisposition of the questionnaire, which in turn, facilitated the data coding and interpretation processes in chapter 5. Ultimately, this section elaborates on the existing trade strategy matrix theory, by

combining constructs with external supporting structures identified in chapter 3 and underlining specific theoretical components that explain the link between the external support structures and retailing fashion design entrepreneurs. Following the Rosenbloom (1976: 61) model, table 4.4 outlines how the constructs were combined and the literature used to conceptualise the qualitative questionnaire.

Table 4.4: Qualitative Operationalisation Framework

Qualitative: Semi-Structured Interviews Guide			
Trade Area Matrix	Trade Area Demand (TAD) (consumer-focused)	Trade Area Geography (TAG) (support focused)	Trade Area Heterogeneity (TAH) (designer focused)
		<i>(Watson et al. 1998; Brydges and Pugh 2017)</i>	<i>(Adhikari et al. 2013; Allenby and Rossi 1998)</i>
Place	Business Operations Retail Formats <i>(Ünay and Zehir 2012; Watson et al. 1998)</i>	Trading (Distribution) Support Business Support <i>(Malem 2008)</i>	Retail Locations
Product	Sales Forecasting Production <i>(Assefa et al. 2014; Thomassey 2010)</i>	Operational & Production/Manufacturing Support Sourcing support Sustainability support <i>(Assefa et al. 2014; Ibrahim and Goodwin 1986: 45)</i>	Product Variety <i>(Szczepaniak 2015)</i>
Pricing	Demand for price premiums <i>(Jung and Jin 2016)</i>	Pricing Support	Price points <i>(Hasselbach and Roosen 2015; Shi et al. 2013)</i>
Promotion	Customer Knowledge Communication with market <i>(Watson et al. 1998; Malem 2008)</i>	Marketing Support <i>(Ünay and Zehir 2012)</i>	Promotion Channels Consumer demographics <i>(Watson et al. 1998; Mosquera et al. 2019; Tran 2017)</i>
Presentation	Visual Merchandising Needs (favourable to customers) <i>(Osman 1993)</i>	Technological support Trading (Visual Merchandising) Support	Visual Merchandising Channels
Personnel	Customer Service <i>(Naqvi 2011; Matzler et al. 1996)</i>	Training and Educational Support Information (General knowledge of support & business) Networking Support Mentoring & Consultants <i>(Kaplan and Norton 1996; Ünay and Zehir 2012; Malem 2008; Fernandes 2019)</i>	Expertise of Personnel Experience of Manager Socioeconomic Background and Skills Number of Personnel <i>(Ibrahim and Goodwin 1986; Watson et al. 1998; Naqvi 2011; Assefa et al. 2014; Malem 2008)</i>

*Financial Support (Ünay and Zehir 2012; Kaplan and Norton 1996; Watson et al., 1998)

Source: Adapted from Rosenbloom (1976: 61)

4.3.1.1 Trade Area Mix

By definition, TAD is more consumer-focused, evaluating the consumers' purchasing power within a specific TAG, intended to assess the geographic extent of a retail trade area with customers, while TAH refers to the mix of consumer market segments within a specific trade area (Rosenbloom 1976: 58-60).

Consequently, TAD focused on consumer-facing aspects within retail fashion design entrepreneurs' businesses, to evaluate how they could have impacted fashion consumer demand through need satisfaction and loyalty patronage. Keeping in mind the focus of this study was retailing fashion design entrepreneurs and the support structures required to ensure their critical success factors, the definition for TAG was adapted to fit the study objectives. As a result, the "customers" in the context of TAG were viewed as the retailing fashion design entrepreneurs and the "retail trade area" was regarded as the support-trade area. Constructively, by definition, in the context of this study, TAG was intended to evaluate the geographic extent of the support trade area with retailing fashion design entrepreneurs.

Eventually, TAH concentrated on the market segments retailing fashion design entrepreneurs targeted, with the notion that heterogeneity does not only address population density measures alone but the different responses consumers display towards other attributes offered to them (Adhikari *et al.* 2013: 7).

i. Place

The focus with place was on business operations and retail formats of retailing fashion design entrepreneurs. The questions related to business operations in this respect were based on the proposition that *(P1) the success of retailing fashion design entrepreneurs was due to their business models, with the involvement of industrial partners* (Ünay and Zehir 2012: 318). Overall, this study focused on omnichannel retailing, considered a retailing format that had the potential to drive consumer patronage in the fashion industry (Cattapan and Pongsakornrungrsilp 2022: 2). Thus, it became imperative to consider the following proposition, *(P2) Retailing fashion design entrepreneurs who recognised the need for omnichannel retailing recognised the need for external support in this area.*

Subsequently, the support structures linked were distribution/trading support and business support, as it was identified that fashion designers needed to understand business and the broader environment they operated from for success (Malem 2008: 399). This then led to the propositions that *(P3) for fashion designers to succeed within their retail place, they recognised the need for external trading/distribution support and (P4) business support*. To evaluate retailing fashion designers' "broader environment" or need for heterogeneity, in terms of the places they operated from, their current and desired trading locations were instrumental as a point of enquiry to evaluate whether *(P5) retailing fashion design entrepreneurs regarded the number of locations they operated from as a critical factor for success*.

ii. Product

Without the product, there would be nothing to drive sales, subsequently, with product attributes, the focus was on sales and manufacturing-related topics. Previous studies found sales forecasting, with relevant and reliable data collected from the information system of distributors, was imperative for retailing fashion design entrepreneurs' success (Thomassey 2010: 270, 482). In the same manner, there is simply no product without production, and one of the critical success factors identified in previous literature was manufacturing (Assefa *et al.* 2014: 19). Considering this information, the slow fashion attributes (authenticity, localism, exclusivity, and functionality, as well as equity) linked to sustainable production, were product attributes that required further enquiry regarding their importance with retailing fashion design entrepreneurs (Jung and Jin 2014; Jung and Jin 2016b, 2016a).

With the abovementioned in mind, the support structures linked for TAG were operational support, production/manufacturing support, sourcing support and sustainability support. The product variety was then the point of enquiry regarding TAH. In summary, the following propositions were observed in this area:

(P6) Retailing fashion design entrepreneurs recognised the need for sales forecasting information from distributors as a critical factor for their success.

(P7) Retailing fashion design entrepreneurs recognised the need for sales reports from distributors as a critical factor for their success.

(P8) To critically succeed with their five slow fashion criteria, retailing fashion design entrepreneurs recognised the need for external production/manufacturing support, (P9) sourcing support and (P10) sustainability support.

iii. Price

Since the product attributes were linked to slow fashion, pricing had to be closely linked to those attributes (Leslie *et al.* 2014: 236). It was important for this study to confirm the demand for fashion products with a price premium and verify that retailing fashion design entrepreneurs were confident those price premiums would not impact their critical success factors, as slow fashion prices were found significantly higher due to the superior quality, timeless designs and smaller quantities related to the products (Jung and Jin 2016b: 4). This led to the proposition that *(P11) retailing fashion design entrepreneurs offered price premiums and were determined with those prices.*

With understanding of those price premiums, retailing fashion design entrepreneurs needed to be formulaic in their pricing approach to create trusted value for consumers, correct market positioning, healthy profit margins, and the ability to break even (Sarma 2015; O'Hare *et al.* 2018: 378). There were numerous pricing strategies, but information on how retailing fashion design entrepreneurs should strategically price their products was unavailable. Accordingly, support for the most appropriate pricing strategy that would lead to information related to pricing premium products was conceptualised for this area. The following proposition was, therefore, considered *(P12) to successfully price their slow fashion products, retailing fashion design entrepreneurs recognised the need for external pricing support.*

What indicated more of an association in literature were price premiums and TAH, as higher price points measuring consumers' willingness to pay for product quality and transactional costs were previously found to cause heterogeneity in various markets (Shi *et al.* 2013: 1163; Hasselbach and Roosen 2015: 622). With that in mind, questions related to retailing fashion design entrepreneurs' variation of price margins were covered in this section, with a greater variation of price margins indicating a greater TAH, which meant *(P13) retailing fashion design entrepreneurs relied on broad price ranges they offered to consumers, for confidence in their pricing strategies.*

iv. Promotion

Various effective strategies for fashion design businesses were identified, including effective communication with the market (Malem 2008: 404). It was, therefore, significant for this section to evaluate what type of market communication retailing fashion design entrepreneurs considered critical in eliciting consumer demand. The Watson *et al.* (1998: 18-19) framework also listed the type of consumers, demographic of the society, lifestyle/consumption patterns and purchase behaviour as factors that impacted the success of entrepreneurs and small businesses. Grouping those factors, “customer knowledge” was then framed as a singular term to evaluate retailing fashion designers’ knowledge of their target market for promotional purposes.

Promotional efforts were proven paramount in the success of retailing fashion design entrepreneurs (Ünay and Zehir 2012: 318). As a result, the support structure linked to the promotional needs of retailing fashion design entrepreneurs was marketing support, which required some form of channels/mediums and some knowledge regarding the consumers those specific efforts were directed at (Kovač *et al.* 2021: 24). This informed the following proposition: *(P14) retailing fashion design entrepreneurs relied on specific promotional channels/mediums with particular strategies to communicate with consumers successfully, and (P15) retailing fashion design entrepreneurs who were confident on those promotional strategies/channels successfully, had good customer knowledge and understanding of the different demographics.*

v. Presentation

Presentation was considered one of the elements that created a store image, recognised as one of the sources that impacted consumer loyalty patronage (Osman 1993: 134). This research focused on visual merchandising, the prevailing fashion presentation method to create the store image when product, price and place were effectively executed (Easy 2009; Choo and Yoon 2015: 231). It was imperative to evaluate the importance of store image linked to visual merchandising, with the proposition that *(P16) retailing fashion design entrepreneurs had specific visual merchandising needs they believed would impact their success critically in retail.*

With the emphasis on visual merchandising, the specific support structure linked was firstly trading support (similar to “place”), as visual merchandising results unfolded within the retail place (Adharin and Marsudi 2019: 129-130). The second support structure was technological, as technologies such as interactive terminals, augmented realities, smartphone applications, and cross-channel marketing were previously cited as advancing visual merchandising atmospherics (Poncin and Ben Mimoun 2014: 851). Since visual merchandising is the aesthetics of the actual retail place (Mitterfellner 2020: 49), TAH was thus associated with the retail location, to evaluate the different visual merchandising needs of the different retail locations. Eventually, the following propositions were framed:

(P17) For retailing fashion design entrepreneurs to succeed with their visual merchandising, they recognised the need for external trading support and (P18) technological support.

(P19) Retailing fashion design entrepreneurs had particular visual merchandising requirements to meet the different needs at retail locations.

vi. Personnel

When it came to personnel, findings proposed that customer service, the expertise of the business and the experience of the manager were the critical success factors (Naqvi 2011: 17), which led to the focus of the study being on the personnel expertise of the business linked with those of the manager, and whether that expertise could meet customer service needs. By definition, the proposition was thus, *(P20) fashion design entrepreneurs had specific customer service approaches that required specialised personnel to meet their customers' needs.*

Considering the customer service and business personnel needs, the support structures identified were training, information, networking, and consultancy support. Generally, the list provided by Malem (2008: 403-404): business understanding, management skills, added consultancy services, and good industry relationships, along with mentorship were used as primary guideline of the support structures required to meet personnel needs, as well as the measure of the TAH level. With that in mind, the following propositions were formulated: *(P21) For retailing fashion design entrepreneurs to succeed with their personnel needs, they recognised the importance*

of training support, (P22) industry information support, (P23) networking/mentoring support and (P24) business consultancy support.

Overall, to evaluate the TAH of personnel, the experience of the manager, socioeconomic backgrounds, skills/expertise of personnel, and the actual number of personnel supporting the business, were integral. Numerous areas that contributed to the success of entrepreneurs were cited as: entrepreneurs' attributes, management skills, interpersonal skills, environmental values, experience, socioeconomic background, knowledge, labour, customer service, manager's experience, prior working experience in the formal sector, family business background and government training (Ibrahim and Goodwin 1986: 45; Watson *et al.* 1998: 219; Naqvi 2011: 17; Assefa *et al.* 2014: 18-19). This led to the following propositions:

(P25) Retailing fashion design entrepreneurs must possess specific business skills to impact their businesses successfully.

(P26) Fashion design entrepreneurs required varied personnel expertise to meet their retail needs successfully.

(P27) Fashion design entrepreneurs required a specific number of personnel to fully meet customer service needs in retail.

In general, the support structures aimed at specific retail mix areas were regarded as primarily financial support or viewed as releasing some financial burden of retailing fashion design entrepreneurs, as financial support was still deemed impactful (Kaplan and Norton 1996; Watson *et al.* 1998; Ünay and Zehir 2012). To reiterate, policies guiding fashion designers to receive necessary grants and investments have been recognised as essential for the creative sector, and policymakers were regarded as beneficial to build on existing strengths and opportunities to support entrepreneurs' business growth (Brydges and Pugh 2017: 958); in this study, those existing strengths and opportunities were guided by the critical retail mix factors outlined by consumers. This led to the final two propositions:

(P28) Fashion design entrepreneurs felt they needed a specific amount of financial support to meet their retail business needs.

(P29) Fashion design entrepreneurs require streamlined processes from external support for those policies and efforts to impact their retail business's critical success.

4.3.2 Qualitative Sampling

The data were collected through in-depth semi-structured interviews, to allow the researcher to ask follow-up questions and extract the most relevant data from the interviewees, considered to have direct experience with the topic of interest, which in turn, assisted the interviewer in gaining enough 'interview knowledge' (Morris 2015: 3). It was important for the researcher to elicit relevant, valuable responses, with rich data to be analysed, made possible through the constructive approach focusing on structure and the realist approach focused on the content, which resulted in fluidity of the interviews (Barbour 2014: 111).

With qualitative research, data could be collected without a specific sample size in mind, instead, the researcher would be guided by the adequacy of the populations' responses, with data collected until the point of saturation was reached (Kumar 2014: 248). As this study did not fully follow the grounded theory approach, the concept of saturation was thematic, code-based, and meaning-based, which assessed the sample size until there were no additional issues or insights that occurred, as opposed to assessing the sample size for the adequacy of data to develop a theory (Sim *et al.* 2018: 622; Hennink and Kaiser 2022: 2). Nonetheless, a provisional sample was still required to ascertain the planning of the data collection process (Robinson 2014: 29). There is a range of sample sizes suggested for qualitative research (Robinson 2014; Sim *et al.* 2018; Turner-Bowker *et al.* 2018; Vasileiou *et al.* 2018; Mthuli, Ruffin and Singh 2021; Subedi 2021; Hennink and Kaiser 2022), however, it was essential to note there were no hard and rigid rules to follow when deciding the sample size for a qualitative study (Subedi 2021). Instead, an estimation of the sample size was an important consideration (Turner-Bowker *et al.* 2018: 839).

Mthuli *et al.* (2021) systematically reviewed qualitative sampling strategies and summarised that a sample size between five and twenty-five was suggested for phenomenological studies. Additional numerical guidelines, focused on theory-based analysis and thematic analysis (similar to this study), found similar sample sizes that ranged between six and forty (Sim *et al.* 2018: 622). As for grounded theory, saturation samples were reached after nine to forty interviews, meaning a minimum of nine interviews were required for code saturation to be achieved, a minimum of sixteen

discussions for meaning saturation to be reached, and a minimum of twenty interviews for multi-site/cross-cultural studies (Vasileiou *et al.* 2018: 3-4).

The sample size for this study was, therefore, dependent on the saturation table or a coding memorandum, detailed in chapter 5, tracking the emergence of themes, to identify when the point of saturation had been reached (Turner-Bowker *et al.* 2018: 840; Pearse 2019a: 148). With deductive qualitative research, it was most likely to reach the point of code saturation from the first interview, with unchanging codes developed as early as interview six (Hennink, Kaiser and Marconi 2017: 597-598). Considering the findings in the literature, the estimated minimum sample size for each country was six interviews, and the estimated maximum was twenty interviews, resulting in twelve to forty interviews between Germany and South Africa. Since relevant processes and situations were of greater importance when sampling the qualitative research (Silverman 2014: 67), theoretical or purposive sampling was applied for this study, which meant the sample was chosen based on the relevance to the research questions or conceptual framework, or the development of the study and according to the sampling logic (Schwandt 2015: 277).

4.3.3 Qualitative Reliability and Validity

To ensure reliability and validity in qualitative research, (i) research credibility was established as the main component that supported trustworthiness and was achieved through the manner data were presented and documented, (ii) transparency was upheld by ensuring full disclosure of the research processes, (iii) transferability (which also advocated for trustworthiness) was made evident by ensuring the research contained explicit directions of the processes, (iv) reflexivity was ensured through full disclosure of the researcher's influences, stance, experiences, decisions, interpretations and biases within the research and finally (covered in chapter 5), (v) the research covered sufficient depth and volume of the data collected (Rheinhardt *et al.* 2018: 515-531).

In detail, reliability was ensured by the research instrument and the analysis process through accuracy, dependability, consistency, and predictability, as well as stability and honesty (Kumar 2014: 215). Data collection and analysis procedures required detailed documentation to achieve this level of accountability [transparency and

reflexivity] for a reliable study (Schwandt 2015: 271). Therefore, interviews were voice-recorded and transcribed to present the extracted data accurately through systematic coding (Silverman 2014: 85-88).

For validity, the research instrument needed to be high quality and demonstrate an ability to measure the research questions (Kumar 2014: 215). As mentioned, the measurement of validity in qualitative research does not require the abstracts or measurements of variables to be standardised (Neuman 2011: 220), however, validity required credibility to be ensured by accurately interpreting data collected from participants (Koonin 2014: 258). Correspondingly, the research instrument in Appendix E was drawn using theoretical guidelines to answer the research questions, and the analysis was conducted according to strict systematic coding guidelines using Nvivo 12.0.

Closely linked to the abovementioned points of sufficient depth and volume of data, and also linked to theoretical sampling, is data triangulation, which is the use of different sources of information at various times and locations to increase research quality (Flick 2018: 11). In essence, triangulation may utilise multiple methods, different places, a variety of participant types, or a mix of relevant variables to the study, through the application of mixed-methods (Given 2016: 71). With the application of triangulation in a mixed method study, multiple perspectives regarding the topic were considered to illustrate the complete picture for more accurate information, when the results of each measure converged on the same answers (Duesbery and Twyman 2020: 96). On the whole, triangulation has been recognised as a strategy to achieve validity, and even as an alternative to attaining validity in qualitative studies, as it adds breadth and depth to research, evaluating subjective knowledge rather than defining one set of objective truth to be verified or falsified (Creamer 2018: 24).

In this study, triangulation was integrated by considering multiple perspectives and sources, such as consumers and retailing fashion design entrepreneurs, as well as datasets from Germany and South Africa on the critical success factors of retailing fashion design entrepreneurs. Ultimately, the mixed-methods approach assisted in triangulating data from different sources, increasing the reliability and validity of the

findings (Liping and Hsin-Hui 2017: 97), crucial in formulating effective policy guidelines for external support.

With the account of the above, it became clear qualitative reliability and validity could not be achieved at one point of the research but had to be ensured by adequately reporting and justifying the processes at every point of the study, from the methodology, data collection process, and pilot testing process, to the interpretation process.

4.4 PILOT TESTING

Pilot testing was conducted to test the feasibility of the quantitative and qualitative data collection instruments and procedures required to prepare for the actual data collection process (Rutherford-Hemming 2018: 1254). For pilot testing to be performed, the persons conducting the pilot studies needed to be identified, the location chosen, participants and respondents placed, and the requirements for the pilot testing needed to be established (Bailey and Burch 2011: 135).

Quantitative pilot testing was conducted with market research students at Ravensburg University of Cooperative Education (DHBW-Ravensburg). Consequently, the surveys were distributed based on the quota sampling determined for Germany, through an online software called UniPark, to ensure anonymity and confidentiality utilising students' personal and professional networks, such as University contacts, work contacts, family, and friends, as well as social media, and more. The market research students were then required to report on numerous factors during the data collection process and provide notes regarding the problems encountered. To ensure the reliability and contextual relevance of the survey instrument, the pilot study was conducted using a student sample population which could not be less than 450 participants. This represented 81.8% of the final sample size of 550 respondents, indicating a high degree of overlap between the pilot and main study populations.

Once the quantitative pilot study was concluded and the comments collected from the participants, the following changes were implemented to the survey:

- Each section was introduced by highlighting the specific areas to focus on by bolding the retail mix element.

- Questions that appeared similar to participants were differentiated with italics.
- Words participants were unfamiliar with were elaborated on in brackets to provide context.
- Some online survey technicalities and glitches were rectified, such as ensuring each page was adequately explained and all spelling mistakes were edited.
- The kano model questions were placed at the end of the survey to ensure consistency with how the questions were presented, by separating different measuring scales.
- Questions related to educational levels were added after advisement by Supervisors.

The qualitative pilot testing was conducted by the researcher, who led the actual interviews for the study. As most of the researcher's networks closely associated with the study are based in South Africa, qualitative piloting was conducted in Johannesburg and Cape Town. The researcher identified at least five participants (not included in the actual study) with previous experience working as retailing fashion design entrepreneurs OR who work for retailers as fashion designers. During the piloting sessions, the researcher recorded the pilot interviews, took notes, noted the time taken for the discussions, and defined problematic areas for revision. After the qualitative pilot interviews, the following changes were implemented in consideration of interview flow and the feedback:

- Some questions were changed to be more open-ended.
- Explanations/definitions were provided in the questionnaire to offer fashion designers more context on terms such as omnichannel.

4.5 ETHICAL CONSIDERATIONS

Ethical consideration was imperative for this study, because it considered essential principles and values when conducting empirical research, which impacted participants, the institution/s of affiliation, and the researchers themselves (Jensen and Laurie 2016: 49). Informed consent, anonymity and confidentiality, as well as protecting participants from harm, were the principle ethical considerations that guided the empirical research (Kumar 2014: 286; Louw 2014: 264; Jensen and Laurie 2016:

48). Appendix E outline and define the ethical considerations for consumers and retailing fashion design entrepreneurs who took part in this study.

4.5.1 Informed Consent

Informed consent in this study was practised through a verbal and written explanation regarding the study to potential participants and respondents, in the hope of reaching an agreement (Ruel 2019: 18). It was important respondents and participants had a clear understanding of their involvement in the study, through distinct explanations related to the type of research study conducted (Louw 2014: 264). With that in mind, and the Protection of Personal Information Act (POPIA code), minors under 18 years, vulnerable groups that could not provide informed consent for themselves, individuals who cannot understand the language the research was conducted in and other individuals who could not make purchasing decisions for themselves, were excluded from the study (Hertzog *et al.* 2021: 2), since they were groups that would be unable to provide informed consent for themselves. Considering this ethical regulation, participants were subsequently informed of their right to withdraw from the study at any point without penalty or consequence. This was clearly stated in the letter of information and reiterated during data collection, ensuring autonomy and voluntary participation. The letter of information can be found in Appendix E.

4.5.2 Anonymity and Confidentiality

To maintain the privacy of participants and respondents, anonymity and confidentiality had to be ensured (Ruel 2019: 19). Specifically applied to the quantitative data, anonymity was achieved by safeguarding the identities and names of respondents, resulting in responses not being matched to any specific individual (but rather numbers) at any point of the research process (Louw 2014: 267). Confidentiality was more applicable in the qualitative research, as the researcher personally conducted the interviews, which resulted in knowledge of the participants; nonetheless, the researcher ensured no one else could link the data collected with a particular participant (Ruel 2019: 19). In totality, the data collected were not shared with individuals outside the research team, and the study population was not identified in the context of the research findings (Kumar 2014: 286). All data were securely stored on encrypted, password-protected devices accessible only to the researcher. Data would then be retained for five years post-publication, after which it will be permanently

destroyed in accordance with DUT's data management policy, as detailed in the letter of information found in Appendix E.

4.5.3 Protecting Participants from Harm

The steps mentioned above were taken to protect participants from potential psychological harm, discomfort or stress (while physical harm associated with this study was unforeseeable), which participants and respondents could associate with reputational risk (Swain 2017: 93). Overall, conscious decisions during the empirical research process were made to avoid feelings of victimisation, because of misinterpretation or misuse of information, and feelings of loss of control or breach of trust, due to inadequately protected privacy (Jensen and Laurie 2016: 48). For example, decisions such as administering interviews and surveys at scheduled times, suitable locations, and the most convenient format for respondents and participants, were made to protect them from harm, while sufficient coding was utilised to ensure the data interpreted were accurate and not misused. In addition, the principle of beneficence was considered, as it refers to the ethical obligation of researchers to maximise benefits and minimise potential harm to participants, with a cornerstone of responsible human research; which requires research to promote participant well-being, ensure meaningful contribution to knowledge, and avoid unnecessary risk (Pieper and Thomson 2016: 117). In this study, beneficence was upheld by ensuring that participation offered value to respondents, either through the opportunity to share their experiences or contribute to knowledge that may inform future support structures for fashion design entrepreneurs. No incentives were offered, and no coercion was applied in the process.

Gatekeepers' control was not particularly necessary for this study, but it was managed by securing formal permission from an institutional/organisational representative before accessing participants. In South Africa, this included a local fashion council (with the letter found in Appendix A), while in Germany, gatekeeping was addressed through collaboration with academic and industry networks. In both cases, gatekeepers were informed of the study's ethical parameters and were not permitted to influence participant responses.

Ethical protocols across the two countries were aligned through adherence to both the Section 14 of the Protection of Personal Information Act (POPIA) 2013 for the South African context and GDPR compliance was ensured for German participants, particularly in relation to data privacy, consent, and withdrawal rights (European Union - EU 2016; Protection of Personal Information Act - POPIA 2019). Potential conflicts such as differing data retention periods were resolved by applying the stricter standard in each case to safeguard participant rights. Generally, the researcher undertook to represent Durban University of Technology (DUT) ethically and professionally while conducting research, by ensuring the DUT ethics committee cleared the research processes and procedures as detailed in Appendix A, before commencing with collecting empirical data.

4.6 CHAPTER SUMMARY

This methodology chapter delineated the implementation of a mixed-methods approach for this study. Initially, emphasis was placed on the quantitative segment, centring on gathering data from consumers through surveys. These surveys were meticulously designed using a myriad of literature pertaining to the retail mix variables, to comprehensively capture data on consumer preferences, behaviours, and perceptions. This resulted in multiple hypotheses that will undergo analysis in the next chapter.

Subsequently, the qualitative approach was explored in this chapter, involving in-depth interviews that would explore the subjective experiences, perspectives, and challenges of retailing fashion design entrepreneurs. The application of the trade area matrix facilitated the elucidation of propositions anticipated to emerge in the following chapter. In both the quantitative and qualitative sections, separate discussions on reliability and validity approaches ensued, recognising the distinct requisites of each method. Concluding the methodology section, ethical considerations were meticulously deliberated, alongside the preliminary step of data collection through pilot testing.

In essence, by embracing a mixed-methods approach, this study endeavoured to triangulate findings from both quantitative and qualitative data sources, thereby facilitating a comprehensive and multi-dimensional analysis of critical success factors

in retailing fashion design entrepreneurship. Ultimately, this chapter provided a detailed and systematic methodology for collecting and analysing data on the critical success factors and the role of external support. The mixed-methods approach, operationalisation of variables, ethical considerations, and pilot testing all contributed to this study, ensuring the proposed policy guidelines are well-founded and applicable to the contexts of both South Africa and Germany. The following chapter will more thoroughly explore the data analysis process and the study findings.

CHAPTER FIVE: DATA ANALYSIS AND FINDINGS

Considering the research methodology discussed in chapter 4, this chapter will explore the heart of this study, presenting a quantitative and then a qualitative analysis of the data collected and unveiling the key findings that emerged from that analysis. By going through the intricacies of data interpretation, this chapter aimed to unravel the insights concealed within the raw information from consumers and retailing fashion design entrepreneurs, providing an understanding of critical success factors of retailing fashion design entrepreneurs. The findings presented herein contribute to the broader discourse of this study and offer valuable implications for practice.

Each section (quantitative and qualitative) commenced with the presentation of the data analysis systems and processes that formed the analysis foundation. With the quantitative section, the discussion advances by applying descriptive and inferential statistical methods and unravelling patterns, trends, and relationships embedded within the data. Meanwhile, the qualitative section examined the rich tapestry of narratives and insights from interviews with retailing fashion design entrepreneurs from Germany and South Africa. The emergent themes and categories brought to the fore offered a qualitative depth to the quantitative analysis. Figure 15 visually represents the context of this chapter.

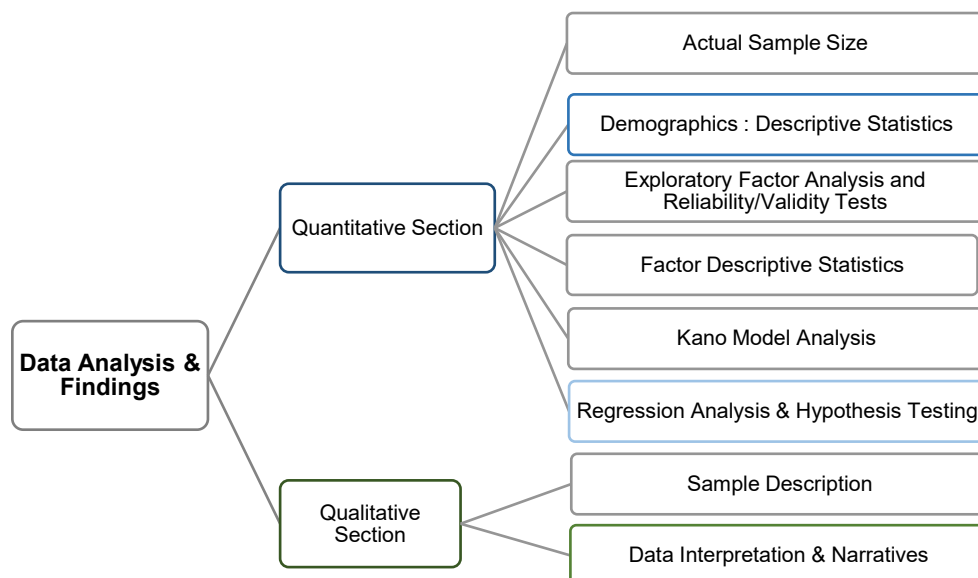


Figure 15: Chapter 5 Outline

Source: Developed by Author

5.1 QUANTITATIVE ANALYSIS

As mentioned in chapter 4, the quantitative questions introduced in the operationalisation construct and outlined in Appendix C were distributed in South Africa (in English) and Germany (in German). To ensure linguistic and conceptual equivalence across both sample groups, the survey was first developed in English and then translated into German using a forward–backward translation process. This was achieved through an initial translation from English to German conducted by a bilingual researcher and copywriter to identify and resolve any semantic discrepancies within the survey. This process ensured that key constructs were consistently interpreted across both languages. Additional review was conducted by this study’s primary supervisor, who is a native German-speaking academic, to confirm the accuracy and appropriateness of terminology, tone, and phrasing. These steps were taken to safeguard linguistic validity, minimise misinterpretation, and ensure that both versions of the questionnaire were methodologically aligned for comparative analysis. Once the survey proved understandable and acceptable after the pretest detailed in the previous chapter, it was distributed to the rest of the quota sample with the assistance of a commercial research company, providing online access panels. The entire questionnaire was distributed online in July 2023.

The survey commenced with an introduction, providing context regarding the research and briefly explaining the survey content. In the introduction, the ethical considerations outlined in chapter 4 were also briefly discussed, requesting informed consent and informing participants the data would be collected anonymously. The survey was divided into eight sections. The first six sections contained questions related to the retail mix, the seventh section contained the kano questions, and the last section dealt with questions concerning demographics, such as gender, age, highest level of education and monthly net household income. The questions and the respective statements provided in the six sections were formatted as 7-point Likert-like scales, ranging from 1 (strongly disagree) to 7 (strongly agree). The kano questions followed with a five-scale frequency, and the last section consisted of demographic questions with various response options. In total, there were 68 questions to be answered, resulting in a survey duration of five to seven minutes, which can be found in Appendix C. This timeframe was based on a pilot test and by testing the initial 50 respondent representative of the dataset in each country, where the majority completed the survey

within this range. The briefness was facilitated by the use of predominantly closed-ended questions and a streamlined digital format, allowing for efficient navigation and response.

5.1.1 Actual Sample Size

Chapter 4 outlined the sampling method and the targeted quota sample. In this section, the actual sample size reached is described to ensure various subgroups targeted within the population were adequately represented in the sample. The total sample size (n) reached in Germany and South Africa was 1 129 respondents, with n=573 in Germany and n=556 in South Africa.

It was essential to analyse quality data by performing systematic data cleaning, identifying and correcting errors, outliers, and inconsistencies to prepare for the data analysis (Toepoel 2016: 175). The initial step in preparing quality datasets was to ensure questionnaire completeness and avoid missing answers by activating the mandatory answer function within the survey, which meant participants could not move on to the next page or submit the survey, without fully answering each question.

The second data preparation process involved straight-lining detection by employing response consistency checks to identify and filter out respondents that consistently selected the same response option (for example, choosing "strongly agree" for every item) to ensure the quality and reliability of the collected data. The third data preparation process involved the identification of outliers by eliminating answers within the survey with a completion time of less than 25 percent of the median, meaning the middle processing time of the survey was used as a reference point, which was 411 seconds (6.85 minutes) in Germany and 520 seconds (8.7 minutes) in South Africa. Resultingly, surveys with a response time of less than 103 seconds (1.7 minutes) in Germany and 130 seconds (2.2 minutes) in South Africa were considered improbable. Subsequently, using the median time to test the plausibility of the completed surveys, we excluded seven completed surveys from South Africa and 13 completed surveys from Germany.

The rest of the data preparation looked for inconsistencies in answers within the datasets. The inconsistencies of answers were checked through control questions, by cross-referencing eight questions (four pairs of questions) to ensure the answers were consistent. That resulted in 45 responses being excluded from South Africa and 41 from Germany. Table 5.1 defines the four pairs of control questions used to clean the dataset; for example, "Check 2" evaluated possible conflicts between the retail place questions when participants strongly agreed (choosing values 6 or 7 on the scale) with question 2, then they also had to agree with question 9 (again choosing values 6 or 7). However, when they strongly disagreed (choosing values 1 or 2 on the scale) with question 9 but strongly agreed with question 2, their answers were considered a conflict, meaning the participants had inconsistent, questionable answers that could not be included in the dataset for accurate representation.

Table 5.1: Quality Check of Conflicting Answers

	South Africa	Germany
Check 2: Conflict Shopping Place		
2. The opportunity to use different channels such as the internet, shops or shopping apps while searching for and buying fashion and clothing <i>is useful for me</i> . (6-7)	2	15
9. I would like to use retailers that offer both online and in-store services at the same time in the future to purchase fashion and clothing. (1-2)		
Check 3: Conflict Paying Price Premiums		
25. Buying fashion products seems smart to me, even if they cost more (6-7)	3	2
27. I am ready to pay a higher price for fashion products that are important to me (1-2)		
Check 4: Fashion Advertisements		
28. Advertisements about fashion are of no concern to me (6-7)	30	9
30. I become completely involved, absorbed or engrossed with advertisements about fashion (6-7)		
Check 5: Personal Interaction		
46. Personal contact with retail personnel is important to me when I shop for fashion (6-7)	3	2
47. I like to talk with retail personnel when I shop for fashion (1-2)		
Total Excluded	45	41

All the implausible responses and the data analysis in the quantitative section were checked through SPSS version 29 by defining the requirements, resulting in the final sample size (n) of 511 in South Africa and 532 in Germany. Consequently, this caused

discrepancies between the given and the achieved quota in South Africa and Germany.

For South Africa, LSM 7 resulted in 9.9 percent more than the targeted quota. In contrast, fewer respondents (8.7 percent) were reached with LSM 10, meaning LSM 7 was represented more than LSM 10 compared to its targeted percentage in the population. Nevertheless, LSM 8 and LSM 9 had minor differences of -0.1 percent and 1 percent from the targeted sample, respectively. Once the differences were identified, a test was conducted to compare the mean values related to fashion products, to evaluate the impact of the discrepancies of the quota reached with LSM 7 and 10. When the differences were found to be minimal, as presented in table 5.2, with the highest difference between the mean values being 0.33 under product locality (Q2r5) and the lowest at 0.02 under product functionality (Q2r11). The decision was made that the imbalance of LSM 7 and LSM 10 was acceptable, as it had minor influences on the overall results.

Table 5.2: Impact on Mean Values: Testing Difference in Quota Reached

		Authenticity			Localism			Exclusivity			Functionality			Equity		
LSM		Q2r1	Q2r2	Q2r3	Q2r4	Q2r5	Q2r6	Q2r7	Q2r8	Q2r9	Q2r10	Q2r11	Q2r12	Q2r13	Q2r14	Q2r15
LSM 7	Mean	5,41	5,69	5,40	4,68	4,88	6,11	4,93	5,27	5,47	5,54	6,11	5,89	5,74	5,37	5,18
	N	209	209	209	209	209	209	209	209	209	209	209	209	209	209	209
LSM 10	Mean	5,36	5,74	5,37	4,62	4,55	6,15	5,15	5,38	5,50	5,73	6,13	5,82	5,67	5,19	5,14
	N	78	78	78	78	78	78	78	78	78	78	78	78	78	78	78
Mean Difference (LSM 7- 10)		0,05	0,05	0,03	0,06	0,33	0,04	0,22	0,11	0,03	0,19	0,02	0,06	0,07	0,18	0,04

In addition, considering the first objective of the study was *to identify (overall) consumer needs to patronise retailing fashion design entrepreneurs*, this meant the most important factor was to reach consumers to provide context into their needs and expectations from retailing fashion design entrepreneurs; the difference in the quota was noted, but not considered as critical to the practical study implications and outcomes. Notably, the results in South Africa were considered more representative of LSM 7 and less representative of LSM 10, while LSM 8 and 9 were both well-represented.

In Germany, the ages of 25-34 years had the highest difference (13.1 percent) to the targeted quota. The 65+ age group were below the targeted quota by 17.2 percent, followed by the 50-64 age group with 8.3 percent. This meant the sample size in Germany predominately represented Generation Z (Gen-Z), Millennials, and Generation X (Gen-X). In contrast, Baby Boomers, Silent, and the Greatest Generations were underrepresented. Other notable but minor differences were with gender, with slightly less than three percent females represented more than males. At the same time, there was a difference of 2.8 percent, as fewer individuals than the targeted quota were reached under the monthly household net income of more than €5001. Table 5.3 illustrates the difference between the targeted and the reached quota samples for each country after the quality check and data cleaning.

Table 5.3: Targeted and Achieved Quotas

South Africa (n=511)				
Criteria	Target (%)	Achieved (%)	Frequency (n)	Difference (% points)
LSM 7	31,0	40,9	209	9,9
LSM 8	24,0	23,9	122	-0,1
LSM 9	21,0	20,0	102	-1
LSM 10	24,0	15,3	78	-8,7
Germany (n=532)				
Male	49,0	46,1	245	-2,9
Female	51,0	53,8	286	2,8
Diverse / not specified	0	0,2	1	0,2
18 – 24	11,4	18,0	96	6,6
25 – 34	14,3	27,4	146	13,1
35 – 49	21,7	27,4	146	5,7
50 – 64	26,2	17,9	95	-8,3
65+	26,4	9,2	49	-17,2
Less than € 1,250	15,4	16,2	86	0,8
€ 1,250 to 2,000	19,7	19,2	102	-0,5
€ 2,001 to 3,000	23,6	24,4	130	0,8
€ 3,001 to 5,000	26,7	28,4	151	1,7
€ 5,001 and more	14,6	11,8	63	-2,8

5.1.2 Demographic Descriptive Statistics

In terms of South African demographics, though gender, age and total monthly household income were not used to determine the quota sampling, the related data

were still collected. In addition, demographic data related to the level of education were also included in both countries. Nonetheless, it is essential to note while the demographic-related data were collected in South Africa, it did not reflect the total population, as the initial quota was based on LSM 7-10 and not the demographic factors discussed. Comparatively, the gender distribution with LSM 7-10 in South Africa and Germany showed minor variations, with South Africa having a slightly higher percentage of females and Germany having a somewhat higher percentage of males. There was a marginally greater representation of females in each country, and at least one person considered themselves as diverse in Germany. The slightly larger representation of females could be attributed to the quality check, indicating females were more engaged with the topic than males.

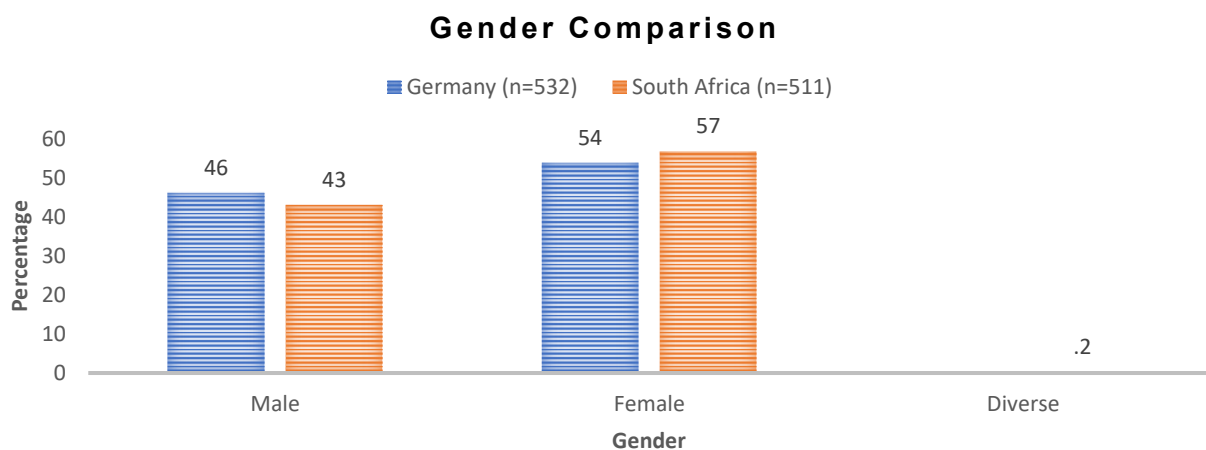


Figure 16: Comparative Data for Gender

With age, Gen-Z (21.7 percent) was more represented in the LSM 7-10 category in South Africa than in Germany (18.0 percent). Nonetheless, the distribution in both countries was similar in age, with the lowest representation from the Baby Boomers, Silent, and the Greatest Generations. At the same time, Gen-X, Millennials and Gen-Z represented the majority respondents. The results thus demonstrated that the sample predominantly represented age groups below 50 years, with only 26.2 percent of the sample more than 50 years old in South Africa and 27.1 percent in Germany.

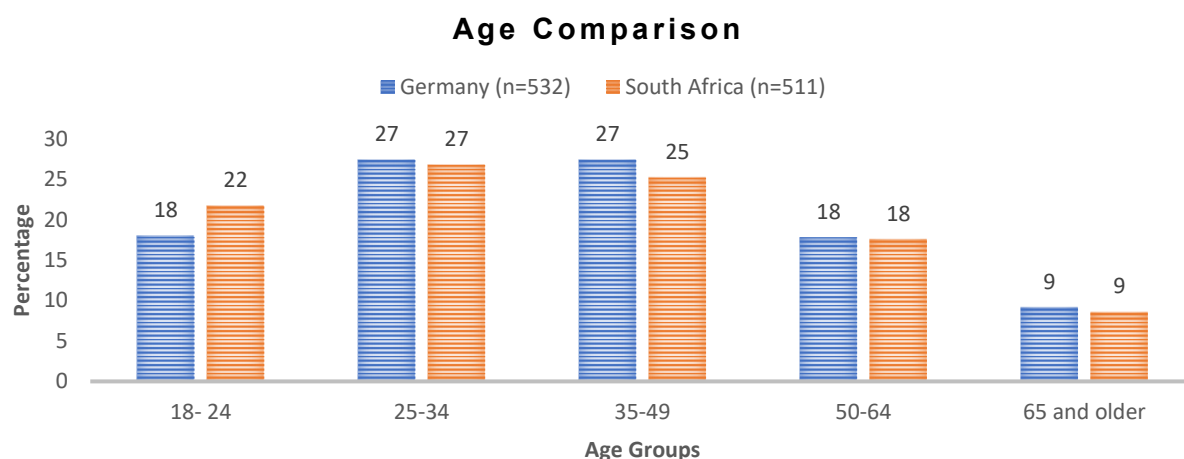


Figure 17: Comparative Data for Age

The monthly net household income distribution revealed similarities and differences between Germany and South Africa's LSM 7-10. With the middle-income bracket, both countries share similarities in the distribution of households, with the difference in the mid-range category being two percent. Meanwhile, the lower income indicated a commonality in the percentage of households with a net household income difference of 0.6 percent between Germany and South Africa. However, with the upper middle-income bracket (R37,001-63,000/3,000 < 5,000€), there was the highest difference of 4.1 percent, as Germany had a higher percentage (28.4 percent) compared to that of South Africa (24.3 percent). This suggested a higher concentration of upper-middle-income households in Germany.

The differences between monthly net household income distribution with LSM 7-10 in South Africa and Germany were notable. South Africa had higher percentages in the lower to mid-income ranges. In contrast, Germany had a higher percentage in the higher income bracket. This indicated a greater proportion of high-income households in Germany. The overall distribution patterns indicated variations in the economic landscape of the two countries.

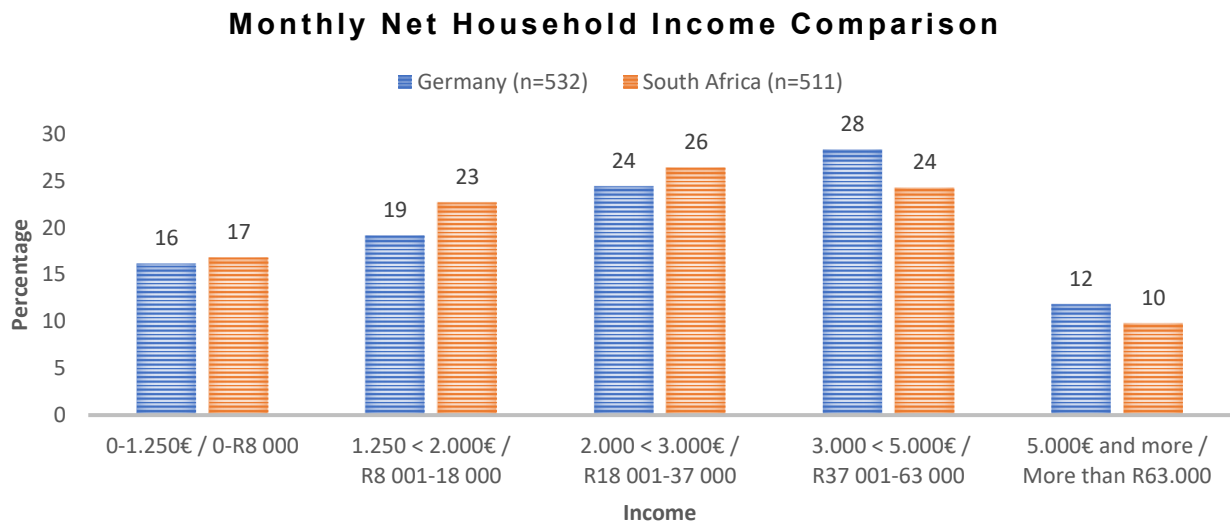


Figure 18: Comparative Data for Monthly Net Household Income

Regarding the education representation within this dataset, there were differences and similarities in the level of education between South Africa's LSM 7-10 and Germany. While there were disparities in primary and high school completion and the distribution of tertiary education qualifications, there were similarities in the percentages of individuals with a Technikon/technical diploma and other post-degree education.

For instance, there was a significantly lower percentage of individuals with only a primary school education with LSM 7 – 10 in South Africa (0.2 percent) compared to Germany (15.6 percent), indicating most South Africans in LSM 7-10 had completed their primary school education. On the contrary, regarding high school education, South Africa had a higher percentage of individuals with a matriculation/high school leaving certificate (35.8 percent) when compared to Germany (23.1 percent). Nonetheless, Germany had a higher percentage of individuals with some high school completed (26.9 percent) compared to South Africa (4.5 percent). This could be attributed to the particular type of education system Germany allows and supports.

Conversely, with tertiary education, South Africa had a higher percentage of individuals with a university degree (32.3 percent) compared to Germany (15.8 percent). Additionally, South Africa had a higher percentage of individuals with a technikon/technical diploma (21.7 percent) than Germany (16.4 percent). South Africa

also had a higher percentage of individuals with other post-degree qualifications (5.5 percent) than those claimed in Germany (2.3 percent).

These differences in educational attainment highlighted variations in the educational systems and opportunities with LSM 7-10 in South Africa and the overall demographic in Germany. Taken as a whole, the South African LSM 7-10 had a higher percentage of individuals with a university degree, while Germany in general had a higher percentage of individuals who had completed high school and pre-university education, and were still able to attain higher monthly net household income.

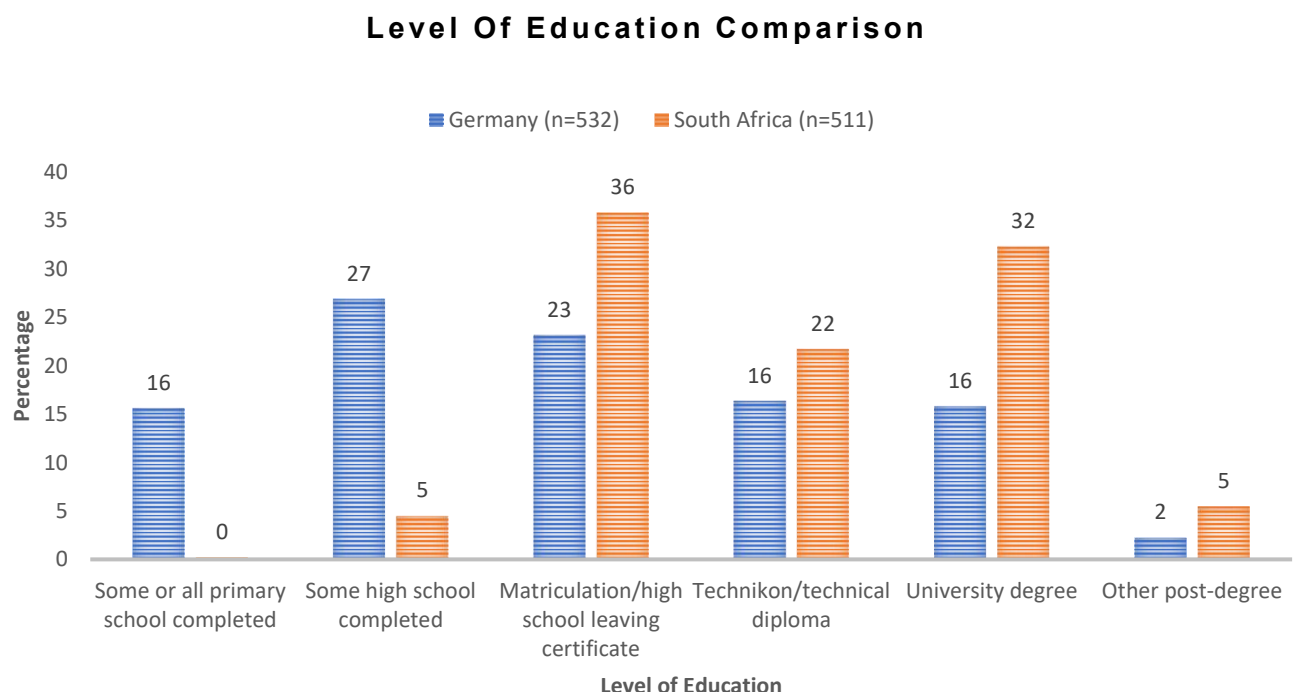


Figure 19: Comparative Data for Education

5.2 EXPLORATORY FACTOR ANALYSIS AND RELIABILITY/VALIDITY TESTS

The initial process before conducting the EFA was to ensure that procedurally the potential influence of common method bias (CMB) within the dataset was reduced. Hence, the survey designed incorporated psychological separation of measurement constructs by distributing items across eight distinct sections, thereby reducing the likelihood of respondents inferring relationships between variables (Podsakoff *et al.* 2003: 879). As previously mentioned in Chapter 4, anonymity and confidentiality were

also assured in the survey introduction, which has been shown to reduce evaluation apprehension and socially desirable responding (Podsakoff, MacKenzie and Podsakoff 2012: 540)

Once the datasets were checked and processed, reliability and validity were additionally confirmed by conducting an EFA and then checking Cronbach's alpha values for the determined factors. With the EFA, the Kaiser normalisation/Kaiser-Meyer-Olkin (KMO) measure and the Bartlett test (BTS) needed to be conducted, as performed with the study on critical success factors for small local consumer brands (Dobbelstein, Mason and Kamwendo 2020: 72). KMO ultimately indicates whether the data were appropriate for factor analysis, with values closer to one being more suitable for factor analysis; with 0.6 as the minimum appropriate level (Dawson 2017: 43).

With this study, the KMO score was 0.962, which indicated a highly suitable dataset for factor analysis. Additionally, the BTS showed whether the correlation matrix was an identity matrix—that is, whether all diagonal elements were 1.0 and whether all off-diagonal elements were 0.0, which implied all the variables were uncorrelated (Schumacker 2016: 179). In this dataset, the BTS value (0.000) proved highly significant.

One additional step before conducting EFA, was to recode the values within the questionnaire to ensure they had the same directionality, with the higher values within the scale representing a higher level of agreement with the construct. The only recoded variable was assigned the 'RECOD' description in table 5.4, which was item Q4R1 (fashion promotion-related item in the questionnaire). The EFA then revealed the underlying patterns or structures in the data by grouping variables into common factors, as the factors were not directly observed but were inferred from the patterns of observed variables (Finch 2020: 2). The analysis employed Principal Component Analysis (PCA) with Varimax rotation, which facilitated the identification of distinct, orthogonal components representing underlying constructs (Schumacker, 2016: 172). This adaptation of EFA using PCA with Varimax rotation is methodologically justified, as it aligns with established recommendations for uncovering latent structures and reducing dimensionality in survey-based research, particularly when the objective is to identify uncorrelated and conceptually coherent factors (Hair *et al.* 2014: 17; Finch

2020: 1). Notably, the rotation converged in 7 iterations, indicating that the algorithm reached a stable solution efficiently and without computational strain.

To ensure a conceptually coherent and statistically valid factor structure, multiple diagnostic checks were applied. PCA, as a dimensionality reduction technique, transforms a large set of correlated variables into a smaller set of uncorrelated components called principal components, while retaining most of the original data's variance. These components are linear combinations of the original variables and are ordered such that the first component explains the maximum possible variance, followed by subsequent components in descending order (Frost 2024).

Ultimately, all variables were considered in drawing out a clean EFA structure. Decisions regarding factor retention and item inclusion were guided by cumulative variance explained and factor loadings. Importantly, all retained items exhibited loadings above 0.40 (under specific variables), affirming their meaningful and distinct contributions to the respective constructs and supporting the discriminant validity of the factor solution.

The definitions of the independent variables were cemented, based on the mean values of variables measuring closely related items according to the EFA results. On the one hand, all variables measuring place, which were *omnichannel usefulness*, *omnichannel intention* and *omnichannel patronage*, had a high loading on the same factor and were grouped as one variable termed *omnichannel preference*. On the other hand, regarding product attributes, *authenticity* and *localism* loaded highly on the same factor, as localism tended to be linked to products of strong originality [authenticity] by consumers (Perera and Ranaweera 2022: 274). One of the significant changes was with a variable initially under functionality, which after the final EFA, it loaded highly as exclusivity; this could be attributed to consumers associating "luxury" products, such as fashion designer products, as more exclusive (Balasyan and Casais 2018).

Last, all the presentation and promotion variables had a high loading of the same factor; therefore, the variables were grouped and renamed *promotional presentation*. These factor loading results could be attributed to consumers not differentiating

between fashion promotion and fashion presentation, as one variable measures the communication cues of the internal store environment, while the other measures external communication cues (Kusumasondjaja 2019: 18). With the EFA, the Kaiser normalisation/ KMO measure and the BTS needed to be conducted, as applied in the analysis evaluating factors influencing purchase intention for recycled products in Germany and South Africa (Dobbelstein and Lochner 2023: 2267). Correspondingly, during the first EFA attempt, one odd variable loaded alone under fashion presentation (Q5R3). Resultingly, the variable had to be removed from the dataset, because no other variables were measuring the same construct. Table 5.4 highlights all the EFA results with the Varimax Rotated Component Matrix.

To finalise the reliability check of the dataset, the consistencies and generalisability were measured by confirming the Cronbach's Coefficient Alpha value (Finch 2020: 9). Cronbach's Alpha ($C\alpha$) should provide a single numerical value between zero and one, indicating the degree to which items in the measure correlate with each other, where higher values suggest greater reliability, implying the items in the scale were measuring a common underlying construct consistently (Taber 2017). With the Cronbach's Coefficient Alpha for each retail mix factor ranging from 0.889–0.965, which is closer to one and above the 0.7 and 0.8 thresholds considered an acceptable coefficient, the measuring instrument proved to be highly reliable, suggesting no items should be excluded from the analysis, even with lower values (Dawson 2017: 61). With the lowest $C\alpha = 0.516$ being product functionality, the decision was made to not exclude the items, due to the overall high $C\alpha$ values of the measuring instrument, with the highest $C\alpha = 0.965$ being *promotional presentation*, while the combined product construct $C\alpha = 0.889$ (which included the low product functionality $C\alpha$).

Table 5.4: Exploratory Factor analysis with Varimax Rotated Component Matrix

ROTATED COMPONENT MATRIX									
Constructs	Item	Components							
		Promotion & Presentation	Place	Personnel	Price	Product (C α =0.889)			
		Promotional Presentation (C α =0.965)	OmniChannel Preference (C α =0.929)	Personnel Interaction (C α =0.952)	Price Premium (C α =0.861)	Authentic Localism (C α =0.835)	Exclusivity (C α =0.862)	Equity (C α =0.832)	Functionality (C α =0.516)
Place	Q1R1	0,311	0,772	0,006	0,132	0,134	0,081	-0,067	0,128
	Q1R2	0,278	0,821	-0,057	0,129	0,130	0,080	-0,037	0,096
	Q1R3	0,258	0,796	-0,028	0,159	0,134	0,089	-0,041	0,088
	Q1R4	0,259	0,774	0,027	0,107	0,139	0,052	-0,020	0,152
	Q1R5	0,273	0,680	-0,059	0,132	0,083	0,041	0,093	0,056
	Q1R6	0,379	0,616	0,060	0,095	0,009	0,209	0,221	0,008
	Q1R7	0,184	0,613	0,206	-0,011	0,021	0,126	0,266	-0,076
	Q1R8	0,399	0,669	0,191	0,020	-0,023	0,209	0,262	0,048
	Q1R9	0,308	0,711	0,188	0,049	0,063	0,180	0,082	0,181
Product	Q2R1	0,149	0,198	0,208	0,134	0,474	0,308	0,171	0,236
	Q2R2	0,119	0,211	0,222	0,097	0,451	0,398	0,164	0,276
	Q2R3	-0,054	0,165	0,059	0,076	0,677	0,236	-0,147	0,221
	Q2R4	0,056	0,022	0,103	0,015	0,781	0,035	0,287	-0,057
	Q2R5	0,091	0,043	0,071	0,112	0,794	-0,053	0,129	0,056
	Q2R6	0,233	0,192	0,083	0,093	0,602	0,144	0,223	0,306
	Q2R7	0,362	0,187	0,182	0,241	0,176	0,658	0,093	-0,062
	Q2R8	0,416	0,192	0,160	0,198	0,131	0,693	0,110	-0,050
	Q2R9	0,394	0,215	0,048	0,243	0,147	0,676	0,015	0,028
	Q2R10	0,338	0,202	0,041	0,065	0,105	0,512	0,135	0,266
	Q2R11	-0,070	0,129	-0,025	0,054	0,150	0,134	-0,004	0,796
	Q2R12	-0,002	0,152	0,165	0,037	0,188	-0,114	0,185	0,588
	Q2R13	0,143	0,168	0,128	0,156	0,379	0,101	0,475	0,427
	Q2R14	0,172	0,118	0,137	0,216	0,322	0,109	0,714	0,166
	Q2R15	0,195	0,113	0,162	0,188	0,318	0,141	0,712	0,076
Price	Q3R1	0,237	0,139	0,138	0,735	0,115	0,170	0,170	0,038
	Q3R2	0,271	0,179	0,103	0,740	0,102	0,172	0,135	0,055
	Q3R3	0,308	0,155	0,082	0,764	0,121	0,152	0,125	0,109
Promotion	Q4R1 (RECOD)	-0,585	-0,170	-0,187	-0,122	0,127	-0,203	-0,067	0,007
	Q4R2	0,713	0,204	0,227	0,159	0,015	0,269	0,161	-0,008
	Q4R3	0,706	0,136	0,216	0,205	-0,003	0,245	0,156	-0,112
	Q4R4	0,844	0,258	0,037	0,102	0,088	0,115	0,067	0,050
	Q4R5	0,811	0,245	0,098	0,112	0,058	0,139	0,085	-0,059
	Q4R6	0,678	0,097	0,198	0,006	0,142	0,091	0,162	-0,074
	Q4R7	0,811	0,241	0,048	0,093	0,091	0,118	0,085	-0,022
	Q4R8	0,836	0,248	0,089	0,087	0,078	0,153	0,068	0,005

	Q4R9	0,836	0,287	0,051	0,067	0,060	0,076	0,060	0,122
	Q4R10	0,829	0,267	0,047	0,060	0,082	0,077	0,078	0,165
	Q4R11	0,810	0,272	0,059	0,051	0,070	0,076	0,043	0,174
Presentation	Q5R1	0,528	0,201	0,191	0,304	0,118	0,136	-0,026	0,245
	Q5R2	0,650	0,213	0,288	0,246	0,017	0,225	0,075	0,013
	Q5R4	0,606	0,357	0,001	0,364	0,175	0,086	-0,093	-0,014
	Q5R5	0,694	0,253	0,178	0,284	0,099	0,133	0,061	-0,105
	Q5R6	0,616	0,288	0,106	0,336	0,168	0,062	-0,110	-0,030
Person	Q6R1	0,241	0,067	0,872	0,124	0,124	0,105	0,085	0,095
	Q6R2	0,240	0,021	0,887	0,080	0,167	0,100	0,095	0,048
	Q6r3	0,263	0,048	0,876	0,106	0,133	0,098	0,111	0,060

Research Model Adaptation of EFA

Once the EFA findings revealed unexpected relationships among the variables, the research model underwent adaptation. The total number of initial hypotheses was eleven. However, the factor analysis results combined some factors into one construct. Consequently, the analysis focused on the influence of five retail mix factors instead of six as initially discussed and eight hypotheses as opposed to eleven.

Considering the retail mix factors, two factors, promotion (H4a and H4b) and presentation (H5), were consolidated into the factor "Promotional Presentations"; subsequently, the supporting hypothesis under promotion was also merged into this construct. As a result, H4a, H4b and H5 were changed into the following hypotheses: H4a: *Promotional-Presentation in the form of general fashion advertising positively influences consumer patronage towards fashion.*

H4b: *Promotional-Presentation in the form of social media involvement positively influences consumer patronage towards fashion.*

H4c: *Promotional-Presentation in the form of visual merchandising positively influences consumer patronage towards fashion.*

The remaining factors unified after the EFA analysis supported the hypothesis evaluating fashion products. The factors *authenticity* (H2a) and *locality* (H2b) were combined as one factor referred to as *authentic localism*, which was hypothesised as a single term:

H2a: *Authentic Localism positively influences consumer patronage towards slow fashion products.*

Generally, there were no changes in the original hypotheses 1, 2c, 2d, 2e, 3 and 6, but hypothesis 6 required renumbering as there were now five main hypotheses, summarised again as:

H1: *Omnichannel retailing positively influences consumer patronage towards fashion retail places.*

H2c: *Exclusivity positively influences consumer patronage towards slow fashion products.*

H2d: *Functionality positively influences consumer patronage towards slow fashion products.*

H2e: *Equity positively influences consumer patronage towards slow fashion products.*

H3: *Paying price premiums does not negatively impact consumer patronage towards fashion*

H5: *Personal interaction positively influences consumer patronage towards fashion.*

With the following changes considered, the original model with eleven hypotheses was replaced by a model with eight hypotheses to be tested, illustrated in figure 20:

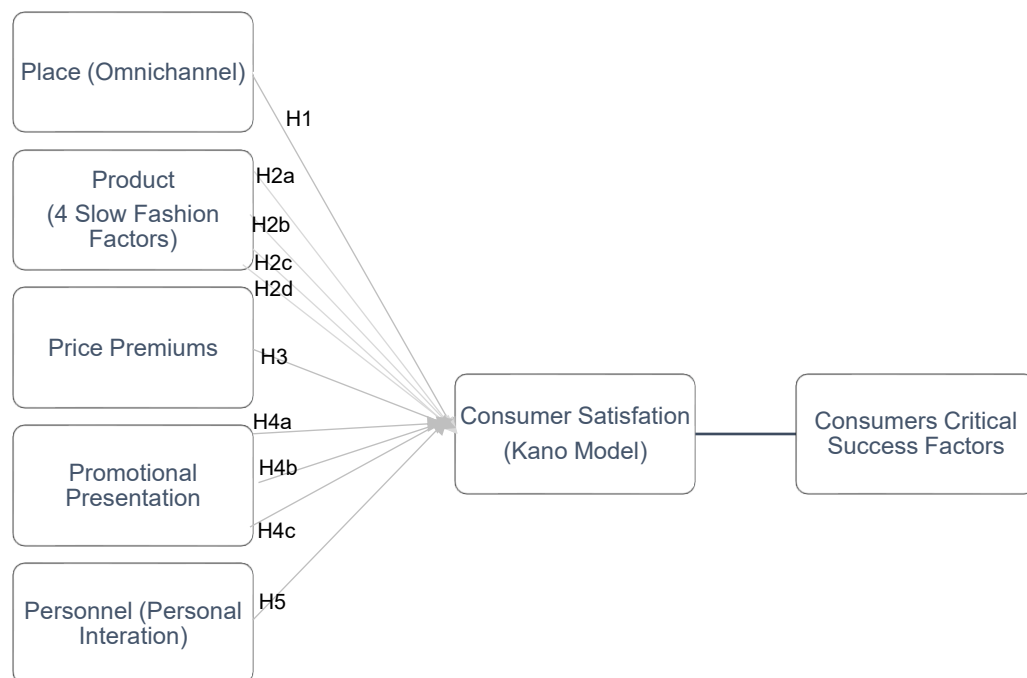


Figure 20: Research Model Adaptation of EFA

Source: Developed by Author

5.3 DESCRIPTIVE STATISTICS OF FACTORS

In this section, the mean values and the standard deviation of the reworked constructs with the EFA and their corresponding items are statistically described, based on the ranked scores where 1 was "strongly disagree" and 7 was "strongly agree".

The values in table 5.5 provide an overview of the descriptive statistics for each construct in each country and overall. There appeared to be variations in the mean scores and standard deviations across countries, indicating potential differences in perceptions and preferences. The main variations were with the lowest mean values, as in South Africa, the lowest mean value was associated with the construct *promotional presentation* (5.137), contrary to Germany, which is related to the construct *personnel interaction* (3.419). With this low mean value of *personal interaction* in Germany, the construct had the overall lowest mean value of (4.156) in both countries. The lowest mean values indicated that respondents, on average, expressed a lower agreement or positive sentiment toward the corresponding aspects. This meant in South Africa, the respondents did not perceive promotional presentations as influential or effective as the other factors. In Germany, the low mean in *personnel interaction* indicated respondents generally felt less optimistic regarding their interactions with personnel or customer service.

Nonetheless, there were some similarities, as the highest mean value in both countries was associated with the construct *product functionality*, with South Africa = 5.973, Germany = 5.597, and overall = 5.781. This suggested the *product functionality* construct associated with slow fashion products, both in individual countries and overall, was particularly important to consumers, as consumers tend to "strongly agree" or "agree" with statements related to the functionality of the fashion products. This meant fashion products with high functionality were highly valued, the practicality of fashion products mattered, and respondents prioritised practical and utilitarian aspects when evaluating fashion products.

The overall average mean value measuring all the constructs in South Africa was 5.344, while in Germany, it was 4.206. This indicated South African consumers were more interested in the constructs measuring preferences related to retail fashion than German consumers. However, South African respondents generally expressed

above-average agreement or positive sentiment towards only two constructs, related to *omnichannel preferences* (5.920) and *product functionality* (5.973), with *authentic localism* (5.317), *product exclusivity* (5.314) and *product equity* (5.343) reflecting more average mean values. Though Germany presented a lower average for its overall mean value, there were more constructs with an above-average agreement or positive sentiment expressed by respondents, with *omnichannel preferences* (4.503), *authentic localism* (4.815), *product equity* (4.343) and *product functionality* (5.597), basically representing aspects of retail place and slow fashion product. It must be noted even though Germany had more constructs above the country's average mean, its average mean was lower than the overall average. In contrast, the South African average mean was higher than the overall average between the two countries.

Understanding the constructs that were above average was crucial, as it meant, on average, respondents in South Africa or Germany tended to express a higher level of agreement or positive sentiment toward the statements or items that made up that particular construct. Furthermore, considering the second objective of this study, which was *to explore/analyse the critical success factors for retailing fashion design entrepreneurs* from the consumers' point of view, the above-average constructs provided insight, an initial idea and the first step into those critical factors in respective countries. For instance, in South Africa, those initial critical (above-average) factors were *omnichannel preferences* and the *product functionality* of clothing, while *authentic localism*, *product exclusivity*, and *product equity* were the product attributes with average mean values, which this study viewed as potential factors for success, but, not critical. At the same time, those critical success factors in Germany were *omnichannel preferences*, *authentic localism*, *product equity* and *product functionality*.

Regarding standard deviations (*s*), respondents had varying levels of agreement or consistency across the factors. Factors such as *product functionality* had a standard deviation of 1.108, and *product authentic localism* had a standard deviation of 1.136, which exhibited relatively low variability, suggesting a higher degree of agreement or consistency. However, factors such as *product exclusivity*, with a standard deviation of 1.617; *personnel interaction*, with a standard deviation of 1.898, and *promotional presentation*, with a standard deviation of 1.630, showed higher variability, indicating a broader range of opinions or attitudes among respondents across the board.

In South Africa, *product functionality* had the lowest standard deviation of 1.054, indicating a relatively consistent opinion among respondents, while *price premium* ($s = 1.615$), *personnel interaction* ($s = 1.740$), and *product exclusivity* ($s = 1.402$) showed higher standard deviations. Similarly, in Germany, *product functionality* again had the lowest standard deviation of 1.129, indicating a relatively consistent opinion among respondents, while *personnel interaction* ($s = 1.748$), *product exclusivity* ($s = 1.457$), *product equity* ($s = 1.435$) and *omnichannel presence* ($s = 1.407$) showed higher standard deviations. Table 5.5 outlines the mean and standard deviations of all factors discussed.

Table 5.5: Descriptive Statistics– Mean Values and Standard Deviations

Country		<i>Promotional Presentattion</i>	<i>Omnichannel Preference</i>	<i>Authentic Localism</i>	<i>Price Premium</i>	<i>Personnel Interaction</i>	<i>Product Exclusivity</i>	<i>Product Equity</i>	<i>Product Functionality</i>	Ave.
South Africa	Mean	5,1372	5,9200	5,3170	4,8239	4,9230	5,3136	5,3431	5,9726	5,3438
	n	511	511	511	511	511	511	511	511	511
	Std. Deviation	1,33389	1,08996	1,07246	1,61470	1,73975	1,40224	1,26047	1,05405	
Germany	Mean	3,1948	4,5027	4,8145	3,9781	3,4192	3,8022	4,3427	5,5968	4,2064
	n	532	532	532	532	532	532	532	532	532
	Std. Deviation	1,28723	1,40703	1,14188	1,38496	1,74785	1,45709	1,43467	1,12852	
Total	Mean	4,1465	5,1971	5,0607	4,3925	4,1560	4,5427	4,8329	5,7809	4,7751
	n	1043	1043	1043	1043	1043	1043	1043	1043	1043
	Std. Deviation	1,63065	1,44664	1,13603	1,55965	1,89840	1,61733	1,44113	1,10820	

5.3.1 Kano Model Analysis

The descriptive analysis with all the factors offered foundational understanding and assisted with the uncovering of patterns, differences, and variability in respondents' perceptions of various factors in South Africa and Germany. The kano model was, therefore, integrated to guide further exploration by providing and prioritising specific retail mix factors that should be regarded as critical to the success of retailing fashion design entrepreneurs.

Matzler *et al.* (1996) drew out a kano analysis table for customer requirements, represented in a matrix format, with features listed on one axis and customer reactions

(categories) on the other. By categorising features based on customer reactions towards functional and dysfunctional questions, this study used the table to prioritise critical success factors within the retail mix, to focus on factors with the most significant effect on consumer satisfaction. For example, with the first kano question, functional - *"Overall, how do you feel when you can shop for your fashion items from multiple retail channels during one shopping trip"* if the respondent chose option 4 (I like it that way) and dysfunctional – *"overall, how do you feel when you cannot shop your fashion items from multiple channels during one shopping trip?"* if the respondent chose option 3 (I am neutral), then the combination of the responses in the kano analysis table would have produced category "Indifferent", highlighted in green in table 5.6, indicating consumers did not seem to prefer or dislike the provided factor, which resulted in the factor playing a limited role in customer satisfaction (Borgianni and Rotini 2013: 263; Atlason *et al.* 2018: 460).

To reiterate the discussions from previous chapters, other features from the kano model included "questionable", indicating a contradiction in consumer expectations; "reverse", illustrating a dislike from customers; "must-be" factors that were taken for granted but necessary to avoid displeased consumers, "attractive" non-assumed attributes, which resulted in proportional customer satisfaction, but with no dissatisfaction when not fulfilled and "one-dimensional" illustrating a linear positive relationship between factors and customer satisfaction (Ji *et al.* 2014: 6336).

Considering the different kano model features and their definitions, together with the objectives of this study, in order to identify consumer needs to patronise retailing fashion design entrepreneurs and explore/analyse the critical success factors for retailing fashion entrepreneurs, this study needed to determine which criteria from the kano model would be considered as critical. On that account, the factors that would be regarded as critical for retailing fashion design entrepreneurs under the kano model would be features regarded as maximising customer satisfaction, which were "must be", "one-dimensional", and "attractive" (Liu *et al.* 2018: 4). The features are highlighted in table 5.6.

Table 5.6: Kano Analysis Table of Customer Requirements

Functional Questions (positive)	Disfunctional Questions (negative)				
	(1) Dislike	(2) Live with	(3) Neutral	(4) Must Be	(5) Like
(1) Dislike	Questionable	Reverse	Reverse	Reverse	Reverse
(2) Live with	Must-Be	Indifferent	Indifferent	Indifferent	Reverse
(3) Neutral	Must-Be	Indifferent	Indifferent	Indifferent	Reverse
(4) Must Be	Must-Be	Indifferent	Indifferent (example)	Indifferent	Reverse
(5) Like	One-Dimensional	Attractive	Attractive	Attractive	Questionable

Source: Adapted from Matzler *et al.* (1996: 10) (Author generated)

5.3.1.1 Kano Model Findings

On the whole, consumers were found indifferent to the retail mix factors. With that level of indifference, the results indicated by the kano model could reflect an assumption that the LSM 7-10 consumers in South Africa and consumers in Germany were not highly involved in retailing needs from fashion designers. That was further confirmed with the customer satisfaction (CS) coefficients, which required the positive coefficient to be closer to 1 to reflect a strong influence on CS and the negative coefficient closer to -1, indicating a higher level of customer dissatisfaction when the requirements were not met, while CS-coefficients approaching 0 signified very little CS influence (Matzler *et al.* 1996: 14). With the positive CS-coefficients ranging from 0.0587–0.2726 and the negative coefficients ranging from 0.0473–0.2051, this means the CS-coefficients were closer to 0 than to 1 or -1 values, which implied the retail mix elements tested in this study did not have much influence on the overall customer satisfaction as indicated in table 5.7.

Although the retail mix elements tested in this study did not signify a strong influence on the overall impact of customer satisfaction, it did not mean they were not critical to the success of retailing fashion design entrepreneurs, as approximately 30 percent of the outcomes indicated some form of interest towards the five retail mix factors involving fashion retail. That was evaluated by adding the "must-have", "one-dimensional", and "attractive" attributes of the kano results, as those were regarded as the customer satisfaction attributes (Matzler *et al.* 1996: 15). Additionally, the kano model results corresponded with the above-average descriptive statistics factor

results, as the factors "place" and "product" were the highest-ranking factors under customer satisfaction attributes, as illustrated in table 5.7.

While the "price" factor also resulted as "indifferent" with consumers, it was by a much lower margin than the rest of the factors, and it was the only factor after adding the "must-have", "one-dimensional", and "attractive" attributes that resulted in a low percentage of 5.8 percent. Instead, the price factor was assessed as "reverse", with both CS-coefficients closer to 0. The negative coefficient indicated not paying price premiums for fashion would not necessarily cause dissatisfaction. On the positive CS-coefficient side, retailing fashion design entrepreneurs would have had minimum satisfaction from consumers who had to pay price premiums. In totality, the "reverse" function in the kano model implied that should the feature of paying price premiums for retailing fashion design entrepreneurs become absent, that would have resulted in increased customer approval (Atlason *et al.* 2018: 460). This meant consumers in Germany and South Africa disliked this function the most, with the implication that paying price premiums for retailing fashion design entrepreneurs should be avoided, as it was unwanted by consumers (Borgianni and Rotini 2013: 263; Liu *et al.* 2018: 4). With the certainty that the reverse feature led to dissatisfaction, this meant the feature had the potential to lead to customer satisfaction when reversed (Matzler *et al.* 1996: 11; Paraschivescu and Cotirlet 2012: 118; Ek and Çıkış 2013: 402). For instance, by making retailing fashion design entrepreneurs' products more affordable. Table 5.7 highlights the kano model results.

Generally, the kano model assisted with understanding which factors were closer to satisfying customers and which were perceived as more of the reverse functions within the retail mix.

Table 5.7: Kano Results of Customer Requirements

	Attractive		One Dimension		Must Be		Indifferent		Reverse		Questionable		Positive CS -Coefficient (Extend of Satisfaction)	Negative CS- Coefficient (Extend of dissatisfaction)
	n	%	n	%	n	%	n	%	n	%	n	%		
Place	147	14,1	102	9,8	91	8,7	601	57,6	70	6,7	32	3,1	0,2646	-0,2051
Product	153	14,7	102	9,8	67	6,4	652	62,5	29	2,8	40	3,8	0,2618	-0,1735
Price	32	3,1	4	0,4	25	2,4	552	52,9	365	35,0	65	6,2	0,0587	-0,0473
Promotion	124	11,9	123	11,8	56	5,4	623	59,7	75	7,2	42	4,0	0,2667	-0,1933
Presentation	116	11,1	112	10,7	71	6,8	663	63,6	43	4,1	38	3,6	0,2370	-0,1902
Personnel	141	13,5	103	9,9	53	5,1	598	57,3	118	11,3	30	2,9	0,2726	-0,1743
	Attractive + One-Dimensional + Must-Be %													
Place	32,6%													
Product	30,9%													
Price	5,8%													
Promotion	29,1%													
Presentation	28,7%													
Personnel	28,5%													

5.3.2 Regression Analysis and Hypothesis Testing

For further comprehensive results, a variety of relationships between different variables that potentially influenced each other had to be summarised through regression analysis (Schroeder, Sjoquist and Stephan 2017: 2). The relationships modelled in this section were between the retail mix factors as dependent variables and the items that potentially influenced those factors as independent variables. Once a model was established for each retail mix factor, insights into potential causal relationships between variables were provided, identifying the variables significantly influencing the dependent variable.

Even though this section outlined the relationship between all dependent variables and the respective independent variables for hypothesis testing, ultimately, the critical success factors are those dependent variables with their independent variables considered above-average, with marginal impact on customer satisfaction, according to the kano model. The regression analysis thus provided context into which independent variables impacted the critical success factors identified in previous sections, while delivering results into all the hypotheses by examining the significance of coefficients.

Since there were five factors to be measured within the retail mix and multiple items within each factor, a multiple regression analysis was employed for each retail factor, which provided an extensive explanation of dependent variables; thereafter, the impact of specific independent variables was determined, and independent variables that possibly distorted the result removed (Lewis-Beck and Lewis-Beck 2016: 55). For each retail mix factor, a regression analysis for South Africa and Germany were conducted, and then an overall regression analysis for both countries was completed.

The adjusted R-squared was additionally calculated with each regression analysis, to determine whether each independent variable could explain the dependent variable in percentage (Lewis-Beck and Skalaban 1990: 154). In each case, the adjusted R-squared value was 1 000 (100 percent fit), with the values of the retail mix factors calculated as the mean of the specific independent variables allocated to the particular dependent factor. Moreover, the regression analysis was not to capture patterns but to evaluate which independent variable (questions within the measuring instrument) influenced the dependent variable the most, to meet the second objective of this study, to *explore/analyse the critical success factors for retailing fashion entrepreneurs*. Furthermore, the perfect R-squared further proved the reliability of the measuring instrument, as it suggested the model perfectly predicted the dependent variable (retail mix factors), based on the independent variables (items within the measuring instrument).

Additionally, tolerance and variance inflation factors (VIFs) were obtained through the collinearity diagnostics, while the Durbin-Watson values were processed to determine whether the independent variables would provide valid regression analysis and results with the dependent variables. In the Durbin-Watson test, the independence of the observations was proven as all the values tested were between 1.401 (*omnichannel presence*) and 1.971 (*personal interaction*), which met the requirements for the values not strongly diverging from 2.0 (Osborne 2017: 65), as evident in Appendix H. Following this, the tolerance values were determined with its inverse, the VIFs, with the tolerance values ensuring the proportion of variance in independent variables was not explained by other independent variables, represented by values ranging from zero to one, with small values of 0.1 or less indicating high multicollinearity, while the

VIFs measured the relationship between the independent variable, with VIFs greater than 10 being problematic, indicating multicollinearity (Parke 2013: 153).

In totality, all tolerance values and VIFs were acceptable, based on the field, nature of the data, and analysis goals. The highest VIF was 5.958 under *promotional presentation*, and the lowest tolerance value was 0.139 under *product functionality*. Furthermore, the probability tests of values (p-values) were calculated to test the significance of the observed results, with the focus placed on the two-sided p-values, which compared two groups (such as South Africa and Germany) and evaluated whether there was a significant difference between the groups when $p < 0.05$ (Ludbrook 2013: 357 & 358). In the case of this study, all variables were found to be highly significant ($p < 0.000$), with less than one percent error.

Once the essential and initial steps were completed, the next steps in the regression analysis involved the examination of the relationships between independent and dependent variables, through the standardised coefficient beta, which allowed comparison of the relative importance of independent variables in influencing the dependent variable (Auspurg and Hinz 2015: 90). Table 5.8 – Table 5.23 highlight all relationships between the dependent variables and the respective independent variable. It is important to note, with this analysis, the additional focus to the regression analysis was on the mean values' significant differences between the two countries.

5.3.2.1 Factors Influencing Omnichannel Preferences

First, the relationship between the dependent variable, *omnichannel preferences* and the nine respective independent variables, which were summarised as *omnichannel time efficiency*, *omnichannel usefulness*, *omnichannel convenience*, *omnichannel usage intention*, *offer of online shopping alternatives*, *information searching options*, *omnichannel patronage intention*, *intention to recommend omnichannel* and *future omnichannel preference* were analysed. It is important to note this dependent variable was identified as above-average in South Africa and Germany. At the same time, it was the highest-ranking variable in the kano model for customer satisfaction, making it a variable considered as a critical success factor. Therefore, it was essential to take notice which independent variables influenced this critical variable the most.

Overall, *information searching options* ($\beta = 0.155$) influenced the preference for omnichannel retailing the most, illustrating that consumers preferred to search for relevant information using their mobile phones while shopping for fashion, which meant retailers needed to provide this option to influence *omnichannel preference*. The overall second and third most impactful variables influencing consumers' preference for omnichannel retailing were, on the one hand, *omnichannel patronage intention* ($\beta = 0.152$) and the *offer of online shopping alternatives* ($\beta = 0.149$), as consumers found it appealing to patronise retailers that offered online and in-store services (instead of using those retailers once-off), while using the option to purchase products online when they could not find it in-store. On the other hand, *future preference* ($\beta = 0.126$) influenced the preference for omnichannel shopping the least, justified as the variable that measured the future use instead of the current preference for omnichannel retailing. This could indicate consumers were more confident with current omnichannel options than future prospects.

In South Africa and Germany, the *offer of online shopping alternatives* (SA: $\beta = 0.175$; Germany: $\beta = 0.157$) had the strongest influence on omnichannel preference. Once again, *future omnichannel preference* ($\beta = 0.129$ in both countries) did not influence the preference for omnichannel shopping as the other variables.

In terms of the significant difference in mean values, the greatest significant difference was found in *the intention to recommend omnichannel* ($d = 2.092$), with t -value = 21.531, $p < 0.001$ and a 95 percent confidence interval, with a lower bound of 1.902 and upper bound of 2.283. The lowest significant difference among the listed items was observed as the *offer of online shopping alternatives* ($d = 1.099$), with t -value = 9.550, $p < 0.001$ and a 95 percent confidence interval lower bound of 0.873 and upper bound of 1.325. This suggested customers were satisfied with their omnichannel experiences (with the overall mean value for *omnichannel preferences* of 5.197), which could drive natural growth through word-of-mouth and recommendations more in South Africa ($\bar{x} = 6.151$) than in Germany ($\bar{x} = 4.058$), as seen in Appendix G. Conversely, consumers were willing to opt and switch to alternative shopping channels to find what they wanted, more so in Germany than in South Africa.

Table 5.8: Regression Analyses for Omnichannel Preference

Items: Independent Variables	Overall			South Africa			Germany			SA – Ger
	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	Diff. in Std. Coeff. beta
Q1R1_ Omnichannel Time Efficiency	0,135	0,268	3,735	0,141	0,353	2,833	0,144	0,285	3,513	-0,004
Q1R2_ Omnichannel Usefulness	0,129	0,205	4,867	0,136	0,246	4,059	0,140	0,223	4,491	-0,004
Q1R3_ Omnichannel Convenience	0,131	0,262	3,823	0,141	0,306	3,263	0,140	0,280	3,569	0,000
Q1R4_ Omnichannel Usage Intention	0,127	0,349	2,867	0,140	0,491	2,038	0,134	0,336	2,974	0,006
Q1R5_ Offer of Online Shopping Alternatives	0,149	0,515	1,943	0,175	0,541	1,848	0,157	0,562	1,779	0,018
Q1R6_ Information Searching Options	0,155	0,457	2,186	0,169	0,500	1,999	0,154	0,558	1,793	0,015
Q1R7_ Omnichannel Patronage Intention	0,152	0,517	1,934	0,196	0,859	1,165	0,145	0,193	5,174	0,051
Q1R8_ Intention to Recommend Omnichannel	0,145	0,275	3,632	0,132	0,336	2,980	0,142	0,187	5,356	-0,010
Q1R9_ Future Omnichannel Preference	0,126	0,337	2,964	0,121	0,333	3,006	0,129	0,470	2,126	-0,009

Table 5.9: Significance of Mean Values, Omnichannel Preferences

Items: Independent Variables	t	df	Significance		Mean Difference	Std. Error Difference	95% Confidence	
			One-Sided p	Two-Sided p			Lower	Upper
Q1R1_ Omnichannel Time Efficiency	13,392	1041	0,000	0,000	1,348	0,101	1,151	1,546
Q1R2_ Omnichannel Usefulness	12,184	1041	0,000	0,000	1,184	0,097	0,993	1,375
Q1R3_ Omnichannel Convenience	12,057	1041	0,000	0,000	1,193	0,099	0,998	1,387
Q1R4_ Omnichannel Usage Intention	12,117	1041	0,000	0,000	1,159	0,096	0,971	1,347
Q1R5_ Offer of Online Shopping Alternatives	9,550	1041	0,000	0,000	1,099	0,115	0,873	1,325
Q1R6_ Information Searching Options	15,875	1041	0,000	0,000	1,784	0,112	1,564	2,005
Q1R7_ Omnichannel Patronage Intention	11,018	1041	0,000	0,000	1,280	0,116	1,052	1,508
Q1R8_ Intention to Recommend Omnichannel	21,531	1041	0,000	0,000	2,092	0,097	1,902	2,283
Q1R9_ Future Omnichannel Preference	18,199	1041	0,000	0,000	1,616	0,089	1,442	1,790

5.3.2.2 Factors Influencing Authentic Localism in Fashion Products

Second, the relationship between the dependent variable, *authentic localism*, and the six respective independent variables, summarised as the *value of traditional techniques*, *importance of craftsmanship*, *preference of handcraft over mass production*, *value of locally made over overseas manufactured fashion*, *value of locally produced material* and the '*need to support local fashion*' were measured. *Authentic Localism* was also a dependent variable that featured as a critical success factor in Germany and as a potential success factor (not critical, as it ranked as average) in South Africa, while it featured on the kano model as the second-ranking factor influencing consumer satisfaction.

The influence of the independent variables on *authentic localism* appeared to have had a more substantial influence on its independent variables than on *omnichannel preferences*, with the overall highest value $\beta = 0.241$ (value of locally made over overseas manufactured fashion) and the lowest value $\beta = 0.215$ (need to support local fashion). This illustrated that overall, consumers valued locally-made fashion products above overseas-manufactured fashion. However, it appeared the value of locally produced fashion did not meet the need to support those locally produced fashion products, signifying a support versus value gap.

In South Africa, the *value of locally produced material* ($\beta = 0.262$) strongly influenced *authentic localism*, demonstrating consumers believed fashion made of locally produced materials was more valuable. The lowest factor influencing *authentic localism* was the same as the overall results: the *need to support local fashion* ($\beta = 0.200$), indicating a gap of 0.062 between the actual support and the value placed on local fashion. Germany, however, had similar results to the overall outcomes as the *value of locally made over overseas manufactured fashion* ($\beta = 0.232$) had the strongest influence on *authentic localism*, with the lowest factor being the preference for handcraft over mass production: ($\beta = 0.208$). These results differed from the overall results and the results in South Africa, which means in Germany, the term handcraft fashion did not have as strong an impact as local fashion.

Considering the significant difference of the *authentic localism* mean values, the greatest significant difference was observed in the *need to support local fashion* ($d =$

0.954), with t -value = 11.119, $p < 0.001$, and a 95 percent confidence interval lower bound of 0.785 and upper bound of 1.122. In this aspect, the results highlighted a stronger preference for supporting local fashion in South Africa than in Germany (indicating a positive reception towards localism from consumers). Nonetheless, the lowest significant difference was found in the *preference for handcraft over mass production* ($d = 0.007$) with t -value = 0.077 $df = 1019519$ and $p = 0.939$. Furthermore, the 95 percent confidence interval ranged from -0.176 to 0.191, indicating the mean difference was not only minimal but also statistically insignificant, suggesting no strong variation of preference was found for handcrafted and mass-produced items among the respondents in South Africa and Germany, with both countries averaging slightly above 0.531, as recorded in Appendix G.

Table 5.10: Regression Analyses for Authentic Localism

	Overall			South Africa			Germany			SA – Ger
Independent Variables	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	Diff. in Std. Coeff. beta
Q2R1_Value of Traditional Techniques	0,223	0,558	1,791	0,231	0,696	1,436	0,209	0,460	2,172	0,022
Q2R2_Importance of Craftmanship	0,218	0,509	1,966	0,220	0,631	1,584	0,211	0,425	2,355	0,009
Q2R3_Preference of Handcraft over Mass Production	0,221	0,641	1,561	0,246	0,654	1,529	0,208	0,537	1,862	0,038
Q2R4_Value of Locally Made over Overseas Manufactured Fashion	0,241	0,559	1,789	0,261	0,548	1,824	0,232	0,560	1,785	0,029
Q2R5_Value Locally Produced Material	0,233	0,519	1,927	0,262	0,530	1,887	0,217	0,442	2,263	0,045
Q2R6_Need to Support Local Fashion	0,215	0,554	1,804	0,200	0,675	1,482	0,215	0,436	2,294	-0,015

Table 5.11: Significance of Mean Values, Authentic Localism

Independent Variables	<i>t</i>	<i>df</i>	Significance		Mean Difference	Std. Error Difference	95% Confidence	
			One-Sided <i>p</i>	Two-Sided <i>p</i>			Lower	Upper
Q2R1_Value of Traditional Techniques	9,576	1041	0,000	0,000	0,866	0,090	0,689	1,044
Q2R2_Importance of Craftmanship	9,247	1041	0,000	0,000	0,819	0,089	0,645	0,992
Q2R3_Preference of Handcraft over Mass Production	0,077	1019,519	0,469	0,939	0,007	0,093	-0,176	0,191
Q2R4_Value of Locally Made over Overseas Manufactured Fashion	3,210	1041	0,001	0,001	0,325	0,101	0,126	0,523
Q2R5_Value Locally Produced Material	0,449	1013,739	0,327	0,654	0,044	0,098	-0,149	0,237
Q2R6_Need to Support Local Fashion	11,119	1041	0,000	0,000	0,954	0,086	0,785	1,122

5.3.2.3 Factors Influencing Product Exclusivity

Third, the relationship between the dependent variable, *product exclusivity*, and the four respective independent variables, summarised as the *appeal of limited-edition fashion*, *attraction to rare fashion*, *enjoyment of owning unique fashion* and *enjoyment of wearing same fashion multiple ways*, were evaluated. It should be noted that *product exclusivity* was the only product attribute found not to be a critical success factor in South Africa and Germany. At the same time, it was viewed as a potential success factor in South Africa, resulting in an average mean value. Compared to the dependent variable, *authentic localism*, the independent variables impacting *product exclusivity* had the strongest influence. Overall, the variable influencing *product exclusivity* the most was the *attraction to rare fashion* ($\beta = 0.317$), while *enjoyment of wearing the same fashion multiple ways* ($\beta = 0.258$) had the least influence towards *product exclusivity*. In other words, respondents were more attracted to rare fashion products than they enjoyed wearing the same fashion items in multiple ways.

The results' ranking was similar in South Africa, with the *attraction to rare fashion* ($\beta = 0.337$) being the highest ranking and *enjoyment of wearing the same fashion multiple ways* ($\beta = 0.270$) being the lowest ranking. There was a slight difference with the results in Germany, in terms of the variable with the biggest influence, which was with the *appeal of limited-edition fashion* ($\beta = 0.316$) being the highest ranking, while the variable with the minor influence was the same as the overall result and the results in

South Africa, which was the *enjoyment of wearing same fashion multiple ways* ($\beta = 0.269$).

In terms of the significant difference of the *product exclusivity* mean values, the greatest significant difference was observed in the *attraction to rare fashion* ($d = 1.794$), with t -value = 15.681, $p < 0.001$, and a 95 percent confidence interval lower bound of 1.570 and upper bound of 2.019. The lowest significant difference, though still statistically significant, was found in the *enjoyment of wearing the same fashion multiple ways* ($d = 0.1258$) with t -value = 13.164, $p < 0.001$, and a 95 percent confidence interval lower bound of 1.071 and upper bound of 1.446. This analysis indicated a substantial consumer interest in unique fashion items in South Africa compared to Germany, highlighting a stronger market for exclusive and limited-edition products in South Africa. Similarly, South African consumers indicated a higher inclination towards the versatility of fashion items.

Table 5.12: Regression Analyses for Product Exclusivity

	Overall			South Africa			Germany			SA – Ger
Items: Independent Variables	Std. Coeff. beta	Tolerance	VIF	Std.Coeff. beta	Tolerance	VIF	Std.Coeff. beta	Tolerance	VIF	Diff. in Std.Coeff. beta
Q2R7_Appeal of Limited-Edition Fashion	0,307	0,390	2,561	0,328	0,522	1,914	0,316	0,379	2,641	0,012
Q2R8_Attraction to Rare Fashion	0,317	0,319	3,140	0,337	0,412	2,425	0,309	0,334	2,994	0,028
Q2R9_Enjoyment of Owning Unique Fashion	0,303	0,402	2,487	0,325	0,449	2,227	0,311	0,481	2,081	0,014
Q2R10_Wearing Same Fashion Multiple Ways	0,258	0,709	1,410	0,270	0,865	1,156	0,269	0,715	1,399	0,001

Table 5.13: Significance of Mean Values, Product Exclusivity

Independent Variables	<i>t</i>	<i>df</i>	Significance		Mean Difference	Std. Error Difference	95% Confidence	
			One-Sided <i>p</i>	Two-Sided <i>p</i>			Lower	Upper
Q2R7_Appeal of Limited-Edition Fashion	13,316	1041	0,000	0,000	1,517	0,114	1,294	1,741
Q2R8_Attraction to Rare Fashion	15,681	1041	0,000	0,000	1,794	0,114	1,570	2,019
Q2R9_Enjoyment of Owning Unique Fashion	13,120	1041	0,000	0,000	1,476	0,113	1,255	1,697
Q2R10_Wearing Same Fashion Multiple Ways	13,164	1041	0,000	0,000	1,258	0,096	1,071	1,446

5.3.2.4 Factors Influencing Product Functionality

Fourth, the relationship between the dependent variable, *product functionality*, and the two respective independent variables, summarised as *preference for clothing longevity* and *preference for classical & simplicity in fashion*, was considered. *Product Functionality* was regarded as one of the critical success factors in South Africa and Germany, with the highest factors ranking in both countries and as one of the product attributes contributing to the second-highest customer satisfaction rating in the kano model.

In addition, considering all the dependent and independent study variables, the influence of the independent variables on the dependent variable *product functionality* was the highest. Overall, *preference for classical & simplicity in fashion* ($\beta = 0.636$) was the most important factor that impacted *product functionality*, while *preference for clothing longevity* ($\beta = 0.580$). The same pattern continued in South Africa and Germany, with the South African results ($\beta = 0.654$) indicating a higher *preference for classical & simplicity in fashion* than Germany ($\beta = 0.614$).

In terms of the significant difference of mean values for *product functionality*, the greatest significant difference was found in the *preference for classical & simplicity in fashion* ($d = 0.565$) with t -value = 6.597, $p < 0.001$, and a 95 percent confidence interval lower bound of 0.397 and upper bound of 0.733. The lower significant difference among the listed items was observed in the *preference for clothing longevity* ($d = 0.187$) with t -value = 2.350, $p = 0.019$, and a 95 percent confidence interval lower bound of 0.031 and upper bound 0.343. The results suggested a high valuation for

classical design aesthetics, which implied a preference for timeless and versatile fashion, with the significance of longevity more in South Africa than in Germany.

It could, therefore, be said that emphasising classical and simple designs first and then promoting clothing longevity, could positively influence consumers' perceptions of product functionality. In combination with the *product exclusivity* results, it could also be said the classical and simple designs needed to be rare or limited edition.

Table 5.14: Regression Analyses for Product Functionality

	Overall			South Africa			Germany			SA – Ger
Product Functionality										
Items: Independent Variables	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	Diff. in Std. Coeff. beta
Q2R11_Preference of Clothing Longevity	0,580	0,878	1,139	0,596	0,923	1,084	0,580	0,838	1,193	0,016
Q2R12_Preference of Classical & Simplicity in Fashion	0,636	0,878	1,139	0,654	0,923	1,084	0,614	0,838	1,193	0,041

Table 5.15: Significance of Mean Values, Product Functionality

Independent Variables	t	df	Significance		Mean Difference	Std. Error Difference	95% Confidence	
			One-Sided p	Two-Sided p			Lower	Upper
Q2R11_Preference of Clothing Longevity	2,350	1040,997	0,009	0,019	0,187	0,079	0,031	0,343
Q2R12_Preference of Classical & Simplicity in Fashion	6,597	1041	0,000	0,000	0,565	0,086	0,397	0,733

5.3.2.5 Factors Influencing Product Equity

The fifth relationship was between the dependent variable, *product equity*, and the three respective independent variables summarised as the *importance of fair compensation, notice of fairtrade or ethical labels and concern for producers working conditions*. Considering the mean values *product equity* was regarded as a critical success factor in Germany, because it had an above-average mean value, and a potential success factor in South Africa, as it had an average mean value, while it was

one of the product attributes contributing the second customer satisfaction rating within the kano model.

Overall, *concern for producers' working conditions* ($\beta = 0.418$) influenced *product equity* the most, meaning consumers were more concerned regarding producers' working conditions when purchasing fashion products. The second factor that affected *product equity* was the *notice of fairtrade or ethical labels* ($\beta = 0.401$), which meant the labels on fashion products indicating the fairness and ethical nature of the product were of high importance to consumers. The last factor influencing *product equity* was the *importance of fair compensation* ($\beta = 0.331$), which addressed the importance of fair compensation for fashion product producers. This was understandable, since it could be considered complex for consumers to determine the compensation of producers when purchasing fashion products. This aspect had an insignificant difference between the lowest and highest independent variables.

Relating to the significant difference of the mean values for *product equity*, the biggest significant difference was noted in the *concern for producers' working conditions* ($d = 1.234$) with t -value = 11.726, $p < 0.001$, and a 95 percent confidence interval lower bound of 1.028 and upper bound of 1.441. This indicated a strong concern for ethical practices in producing fashion items, particularly in South Africa ($\bar{x} = 5.082$) compared to Germany ($\bar{x} = 3.848$), as seen in Appendix G. The smallest, but still significant, difference was in the *importance of fair compensation* ($d = 0.717$) with t -value = 8.345, $p < 0.001$, and a 95 percent confidence interval lower bound of 0.549 and upper bound of 0.886. This suggests a moderately greater concern for fair compensation in South Africa, when compared to Germany.

Table 5.16: Regression Analyses for Product Equity

Items: Independent Variables	Overall			South Africa			Germany			SA – Ger
	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	Diff. in Std.Coeff. beta
Q2R13_Importance of Fair Compensation	0,331	0,633	1,581	0,337	0,744	1,343	0,346	0,610	1,641	-0,008
Q2R14_Notice of Fairtrade or Ethical Labels	0,401	0,388	2,576	0,430	0,565	1,771	0,389	0,282	3,550	0,041
Q2R15_Concern for Producer" Working Conditions	0,418	0,429	2,332	0,450	0,619	1,617	0,394	0,312	3,203	0,056

Table 5.17: Significance of Mean Values, Product Equity

Independent Variables	t	df	Significance		Mean Difference	Std. Error Difference	95% Confidence	
			One- Sided p	Two- Sided p			Lower	Upper
Q2R13_Importance of Fair Compensation	8,345	1041	0,000	0,000	0,717	0,086	0,549	0,886
Q2R14_Notice of Fairtrade or Ethical Labels	10,253	1041	0,000	0,000	1,049	0,102	0,849	1,250
Q2R15_Concern for Producer" Working Conditions	11,726	1041	0,000	0,000	1,234	0,105	1,028	1,441

5.3.2.6 Factors Influencing Payment of Price Premiums

The sixth relationship considered was between the dependent variable, *price premiums* and the three respective independent variables, summarised as the *preference for fashion products regardless of high prices, preference for specific fashion products over reduced fashion* and *'readiness to pay high prices for valued fashion'*. It is essential to note that within the kano model, paying *price premiums* for consumers was moving towards being regarded as a "reverse" attribute for customer satisfaction when the following statements were considered: *overall, how do you feel when you pay price premiums for fashion designers' products in retail* and *"overall, how do you feel when you do not have to pay price premiums for fashion designer products in retail?* As a result, the independent factors influencing the willingness of consumers to pay price premiums were analysed with the reverse concept in mind, while the reverse and remedy of paying price premiums was viewed as a critical success factor in both countries.

In general, the factors influencing the payment of premium prices towards fashion products were the most closely related values of all the variables analysed. The *readiness to pay high prices for valued fashion* ($\beta = 0.382$) was rated slightly higher than the *preference for specific fashion products over reduced fashion* ($\beta = 0.375$) and the *preference for fashion products regardless of high prices* ($\beta = 0.373$). Closely comparing these results and statements with the kano model statements, it became clear that, overall, consumers' payment of price premiums needed to be justified with some form of value-added and/or consideration for consumer preferences. In other words, the label of a fashion designer product (without value-added or consideration of consumer preferences) was not enough to satisfy customers paying price premiums; instead, it had the potential to reverse customer satisfaction. Ultimately, in South Africa, the results indicated the *preference for fashion products regardless of high prices* ($\beta = 0.385$) had a greater influence on paying price premiums than in Germany ($\beta = 0.375$), while in Germany, the *preference for specific fashion products over reduced fashion* ($\beta = 0.378$) had a greater impact on paying price premiums than in South Africa ($\beta = 0.371$).

Regarding the significant difference of the mean values for *price premiums*, the most substantial significance was found in the *preference for specific fashion products over reduced fashion* ($d = 0.992$) with t -value = 9.513, $p < 0.001$, and a 95 percent confidence interval lower bound of 0.788 and upper bound of 1.197. The smallest, yet statistically significant difference was observed in the *preference for fashion products regardless of high prices* ($d = 0.668$) with t -value = 6.284, $p < 0.001$, and a 95 percent confidence interval lower bound of 0.459 and upper bound of 0.876.

These findings highlighted that more South African consumers ($\bar{x} = 4.824$), were more likely to invest in valued products, reflecting strong market potential for premium, value-added fashion items than in Germany ($\bar{x} = 3.978$). It should be noted that *price premiums* showed the least variation between the highest and lowest mean differences. This suggested consumer attitudes towards higher prices for fashion products were relatively consistent between variables, indicating stable market perceptions of consumers paying price premiums.

Table 5.18: Regression Analyses for Price Premiums

Items: Independent Variables	Overall			South Africa			Germany			SA – Ger
	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	Diff. in Std. Coeff. beta
Q3R1_Preference of Fashion Products Regardless of High Prices	0,373	0,503	1,986	0,385	0,507	1,971	0,375	0,536	1,864	0,011
Q3R2_Preference of Specific Fashion Products over Reduced Fashion	0,375	0,447	2,239	0,371	0,517	1,934	0,378	0,413	2,420	-0,007
Q3R3_Readiness to Pay High Prices for Valued Fashion	0,382	0,399	2,509	0,388	0,425	2,356	0,381	0,412	2,429	0,007

Table 5.19: Significance of Mean Values, Price Premiums

Independent Variables	t	df	Significance		Mean Difference	Std. Error Difference	95% Confidence	
			One-Sided p	Two-Sided p			Lower	Upper
Q3R1_Preference of Fashion Products Regardless of High Prices	6,284	1041	0,000	0,000	0,668	0,106	0,459	0,876
Q3R2_Preference of Specific Fashion Products over Reduced Fashion	9,513	1041	0,000	0,000	0,992	0,104	0,788	1,197
Q3R3_Readiness to Pay High Prices for Valued Fashion	8,172	1041	0,000	0,000	0,877	0,107	0,667	1,088

5.3.2.7 Factors Influencing Promotional Presentation

The seventh relationship considered was between the dependent variable *promotional presentation* and the 16 respective independent variables, which were summarised as *concern about fashion ads, attention towards fashion ads, involvement with fashion ads, social media inspiration for fashion purchases, social media eliciting fashion purchases online, social media eliciting fashion purchases offline, social media contacts influencing intension of fashion purchases, attraction of fashion shared by social media contact, social media ads as a source of fashion information, social media ads used to update fashion, convenience of social media ads, motivation to buy fashion from attractive store interior, motivation to buy fashion from interesting store window, attractiveness of online store as motivation for fashion purchase, compulsion*

to purchase fashion from interesting online store' and *reliance on online display for fashion purchase decisions*. Generally, *promotional presentation* was not regarded as a critical success factor in either country. Still, it was considered a potential success factor in South Africa, with a just below-average factor ranking of 5.137.

Through a broader lens, the influence of the independent variables on the dependent variable *promotional presentation* was not as highly significant as all the other variables in this study, resulting in the independent variables with the lowest values. Overall, *compulsion to purchase fashion from interesting online stores* ($\beta = 0.082$), *social media eliciting fashion purchases online* ($\beta = 0.082$) and *social media contacts influencing the intention of fashion purchases* ($\beta = 0.082$) influenced *promotional presentation* the most, illustrating that promotional presentations from social media and the contacts, created impulses for consumers to purchase fashion. Notably, the independent variables influencing consumers towards *promotional presentation* were closely linked. For instance, the second and third most impactful variables influencing *promotional presentation* were *attraction to fashion shared by social media contact* ($\beta = 0.081$), *attention towards fashion ads* (0.080) and *social media inspiration for fashion purchases* ($\beta = 0.080$). The next variable, with the least influence on *promotional presentation* was *motivation to buy fashion from attractive store interiors* ($\beta = 0.064$), meaning attractive store interiors were the last motivation for consumers to purchase fashion. This ranking was the same for South Africa ($\beta = 0.067$) and Germany ($\beta = 0.077$).

The highest-ranking variables, however, differed between South Africa and Germany. In South Africa, the *involvement with fashion ads* ($\beta = 0.095$) had the highest influence, which indicated that traditional fashion advertisements were more appealing to consumers in South Africa. Conversely, in Germany, *convenience of social media ads* ($\beta = 0.090$) was the most impactful form of *promotional presentation*, as consumers used social media the most as a convenient source of information. Interestingly, when considering *promotional presentation* in South Africa, traditional fashion advertising ($\beta = 0.095$) was the most effective, and in Germany, social media advertisements were the most effective ($\beta = 0.090$).

Considering the significant difference of the mean values for *promotional presentation*, the biggest highly significant difference ($d = 2.384$) between South Africa and Germany was regarding the responses with *motivation to buy fashion from interesting store window*, with t -value = 22.887, $p < 0.001$, and a 95 percent confidence interval lower bound of 2.179 and upper bound of 2.588. At the same time, the second biggest highly significant mean difference was with the *compulsion to purchase fashion from interesting online stores* ($d = 2.327$). The smallest yet significant difference was noted as *social media eliciting online fashion purchases* ($d = 1.269$) with t -value = 11.316, $p < 0.001$, and a 95 percent confidence interval lower bound of 1.049 and upper bound of 1.490.

The findings highlighted the critical role of physical and digital presentations for *promotional presentation*, as store windows indicated the most significant difference, closely followed by online store presentations, with South African consumers averaging significantly higher than consumers in Germany, as observed in Appendix G. Social media also played a more significant role in South Africa than in Germany.

Table 5.20: Regression Analyses for Promotional Presentation

	Overall			South Africa			Germany			SA – Ger
Items: Independent Variables	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	Diff. in Std. Coeff. beta
Q4R1_Concern about Fashion Ads	0,076	0,494	2,023	0,090	0,614	1,628	0,082	0,563	1,776	0,008
Q4R2_Attention towards Fashion Ads	0,080	0,252	3,962	0,088	0,385	2,598	0,079	0,266	3,761	0,008
Q4R3_Involvement with Fashion Ads	0,078	0,288	3,468	0,095	0,377	2,653	0,077	0,284	3,517	0,018
Q4R4_Social Media Inspiration for Fashion Purchases	0,080	0,197	5,080	0,082	0,221	4,518	0,089	0,294	3,406	-0,008
Q4R5_Social Media Eliciting Fashion Purchases Online	0,082	0,243	4,117	0,091	0,286	3,495	0,087	0,339	2,950	0,004
Q4R6_Social Media Eliciting Fashion Purchases Offline	0,074	0,511	1,957	0,091	0,659	1,517	0,081	0,381	2,624	0,010
Q4R7_Social Media Contacts Influencing Intension of Fashion Purchases	0,082	0,227	4,409	0,093	0,333	3,005	0,086	0,233	4,297	0,007
Q4R8_Attraction of Fashion Shared by Social Media Contact	0,081	0,182	5,490	0,084	0,261	3,831	0,085	0,224	4,461	-0,001
Q4R9_Social Media Ads as Source of Fashion Information	0,079	0,183	5,468	0,078	0,267	3,742	0,089	0,234	4,278	-0,012
Q4R10_Social Media Ads Used as Update Fashion	0,077	0,168	5,958	0,074	0,261	3,835	0,087	0,203	4,934	-0,013
Q4R11_Convenience of Social Media Ads	0,077	0,179	5,574	0,072	0,259	3,861	0,090	0,230	4,347	-0,017
Q5R1_Motivation to Buy Fashion from Attractive Store Interior	0,064	0,481	2,080	0,067	0,546	1,833	0,077	0,584	1,711	-0,010
Q5R2_Motivation to Buy Fashion from Interesting Store Window	0,079	0,296	3,379	0,079	0,448	2,233	0,082	0,376	2,662	-0,003
Q5R4_Attractiveness of Online Store as Motivation for Fashion Purchase	0,072	0,363	2,758	0,080	0,339	2,946	0,085	0,461	2,170	-0,005
Q5R5_Compulsion to Purchase Fashion from Interesting Online Store	0,082	0,236	4,244	0,090	0,264	3,786	0,080	0,350	2,856	0,010
Q5R6_Reliance on Online Display for Fashion Purchase Decisions	0,075	0,363	2,751	0,089	0,384	2,604	0,084	0,420	2,383	0,005

Table 5.21: Significance of Mean Values, Promotional Presentation

Independent Variables	<i>t</i>	<i>df</i>	Significance		Mean Difference	Std. Error Difference	95% Confidence	
			One-Sided <i>p</i>	Two-Sided <i>p</i>			Lower	Upper
Q4R1_Concern about Fashion Ads	15,410	1041	0,000	0,000	1,718	0,112	1,500	1,937
Q4R2_Attention towards Fashion Ads	20,927	1041	0,000	0,000	2,268	0,108	2,055	2,481
Q4R3_Involvement with Fashion Ads	16,486	1041	0,000	0,000	1,846	0,112	1,626	2,066
Q4R4_Social Media Inspiration for Fashion Purchases	19,150	1041	0,000	0,000	2,126	0,111	1,908	2,343
Q4R5_Social Media Eliciting Fashion Purchases Online	17,768	1041	0,000	0,000	2,058	0,116	1,831	2,285
Q4R6_Social Media Eliciting Fashion Purchases Offline	11,316	1041	0,000	0,000	1,269	0,112	1,049	1,490
Q4R7_Social Media Contacts Influencing Intension of Fashion Purchases	17,563	1041	0,000	0,000	2,048	0,117	1,819	2,276
Q4R8_Attraction of Fashion Shared by Social Media Contact	20,826	1041	0,000	0,000	2,287	0,110	2,072	2,503
Q4R9_Social Media Ads as Source of Fashion Information	20,403	1041	0,000	0,000	2,215	0,109	2,002	2,428
Q4R10_Social Media Ads Used as Update Fashion	20,617	1041	0,000	0,000	2,161	0,105	1,955	2,367
Q4R11_Convenience of Social Media Ads	19,633	1041	0,000	0,000	2,075	0,106	1,868	2,282
Q5R1_Motivation to Buy Fashion from Attractive Store Interior	15,169	1041	0,000	0,000	1,422	0,094	1,238	1,606
Q5R2_Motivation to Buy Fashion from Interesting Store Window	22,887	1041	0,000	0,000	2,384	0,104	2,179	2,588
Q5R4_Attractiveness of Online Store as Motivation for Fashion Purchase	13,298	1041	0,000	0,000	1,432	0,108	1,221	1,643
Q5R5_Compulsion to Purchase Fashion from Interesting Online Store	21,071	1041	0,000	0,000	2,327	0,110	2,110	2,544
Q5R6_Reliance on Online Display for Fashion Purchase Decisions	12,841	1041	0,000	0,000	1,443	0,112	1,223	1,664

5.3.2.8 Factors Influencing the Need for Personal Interaction

The final relationship considered was between the dependent variable, *personal interaction*, and the three respective independent variables summarised as *importance of interaction with fashion retail personnel*, *interest in personal contact with fashion retail personnel* and *interest conversation with fashion retail personnel*. Personal interaction was not regarded as a critical success factor in either country, but the regression analysis was conducted to test the hypothesis.

Similar to the dependent variables, *price premiums* and *promotional presentation*, the factors influencing *personal interaction* were also closely related in values. Consumers

signified slightly more *interest in conversation with fashion retail personnel* ($\beta = 0.356$) and *interest in personal contact with fashion retail personnel* ($\beta = 0.351$) than *Interest in Interaction with Fashion Retail Personnel* ($\beta = 0.339$). This meant that, overall, the starting point of personal interaction with consumers was conversation instead of just essential contact, interaction, or the presence of retail personnel. The results ranking was the same in both countries, with South Africa generally more willing to engage with personnel than Germany.

Relating to the significant difference of *personal interaction* mean values, the biggest significant difference was noted as the *importance of conversation with personnel* ($d = 1.557$) with t -value = 13.420, $p < 0.001$, and a 95 percent confidence interval lower bound of 1.329 and upper bound of 1.784. This indicated that more consumers in South Africa ($\bar{x} = 4.908$) preferred engagements with personnel working in retail than in Germany ($\bar{x} = 3.352$). The smallest but significant difference was the *importance of interaction with personnel* ($d = 1.461$) with t -value = 13.179, $p < 0.001$, and a 95 percent confidence interval lower bound of 1.244 and upper bound of 1.679. This again suggested the importance of personnel and retailing fashion designers personally interacting with consumers, more so in South African consumers than in Germany.

Table 5.22: Regression Analyses for Personal Interaction (Author's Own)

Independent Variables	Overall			South Africa			Germany			SA – Ger
	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	Std. Coeff. beta	Tolerance	VIF	
Q6R1_Importance of Interaction with Personnel	0,339	0,208	4,814	0,342	0,296	3,383	0,342	0,184	5,437	0,000
Q6R2_Importance of Personal Contact with Personnel	0,351	0,181	5,535	0,362	0,262	3,816	0,347	0,154	6,489	0,015
Q6R3_Importance of Conversation with Personnel	0,356	0,181	5,522	0,364	0,246	4,069	0,352	0,175	5,707	0,012

Table 5.23: Significance of Mean Values, Personal Interaction (Author's Own)

Independent Variables	<i>t</i>	<i>df</i>	Significance		Mean Difference	Std. Error Difference	95% Confidence	
			One-Sided <i>p</i>	Two-Sided <i>p</i>			Lower	Upper
Q6R1_Importance of Interaction with Personnel	13,179	1041	0,000	0,000	1,461	0,111	1,244	1,679
Q6R2_Importance of Personal Contact with Personnel	12,996	1041	0,000	0,000	1,494	0,115	1,268	1,719
Q6R3_Importance of Conversation with Personnel	13,420	1041	0,000	0,000	1,557	0,116	1,329	1,784

5.3.3 Summary of Quantitative Results

This quantitative analysis identified key critical success factors as product (slow fashion), retail place (omnichannel), and understanding of pricing (premium). A regression analysis was conducted to provide a framework for systematically testing hypotheses between dependent and independent variables relationships. Ultimately, all the hypotheses were supported, with all the independent variables signifying a highly significant relationship with the dependent variables, with *omnichannel preference* $H1: \beta_1 (0.127 - 0.155) > 0$, product *authentic localism* $H2a: \beta_{2a} (0.215 - 0.241) > 0$, product *exclusivity* $H2b: \beta_{2b} (0.258 - 0.317) > 0$, product *functionality* $H2c: \beta_{2c} (0.580 \text{ \& } 0.636) > 0$, product *equity* $H2d: \beta_{2d} (0.311 - 0.418) > 0$, price *premiums* $H3: \beta_3 (0.373 - 0.382) > 0$, *personal interaction* $H5: \beta_5 (0.339 - 0.356) > 0$. Interestingly, the independent variables measuring the influence of *promotional presentation* did not have as much of a significant relationship as the other variables with the following results; $H4: \beta_4 (0.064 - 0.082) > 0$. Conclusively, each proposed factor had a statistically significant positive influence on consumer patronage towards fashion retail places, products, price, and promotional presentation, as well as personnel, which meant the modified research model remained unchanged, illustrated in figure 20.

In examining the findings from the descriptive analysis of single mean values, alongside the kano model and regression analysis, it became clear that although the factors of the retail mix were initially deemed "indifferent" by consumers, aiming to elevate these to "attractive" status required careful consideration. Specifically, the combination of above-average mean values and the insights from regression analysis

should inform the prioritisation of which factors to address first in each market, focusing on those deemed critical for success.

Table 5.24: Summary of Quantitative Results

	SOUTH AFRICA	GERMANY
Highest Representation of Demographics		
Gender	Female (South Africa Highest)	
Age	1. 25-34 (Germany Highest) 2. 35-49 (Germany Highest) 3. 18-24 (South Africa Highest)	
Monthly Net Household Income	R18 001-37 000 / 2.000 < 3.000€	R37 001-63 000 / 3.000 < 5.000 €
Education	1. Matriculation/high school leaving certificate 2. University degree	1. Some high school completed 2. Matriculation/high school leaving certificate
LSM	LSM 7	N/A
Above-Average Factor Rankings with Highest Influencing Independent Factors		
Omnichannel Preferences	1. Omnichannel Patronage Intention 2. Offer of Online Shopping Alternatives 3. Information Searching Options	1. Offer of Online Shopping Alternatives 2. Information Searching Options 3. Omnichannel Patronage Intention
Product Functionality	1. Preference for Classical & Simplicity in Fashion 2. Preference for Clothing Longevity <i>(Both variables are significantly more influential in South Africa)</i>	
Authentic Localism	<i>Average Success Factor</i> 1. Valuing Locally Produced Material	1. Value of Locally Made over Overseas Manufactured Fashion 2. Value Locally Produced Material 3. Need to Support Local Fashion
Product Equity	<i>Average Success Factor</i> 1. Concern for Producer's Working Conditions	1. Concern for Producer's Working Conditions 2. Notice of Fairtrade or Ethical Labels 3. Importance of Fair Compensation
Product Exclusivity	<i>Average Success Factor with</i> 1. Attraction to Rare Fashion	N/A
Kano Model (Customer Satisfaction) Implications		
Price Premiums	"reverse" attribute for critical success and customer satisfaction	
Place	Overall, top ranking dependent factor with an "Indifferent" attribute but represented 32,6% of customer satisfaction	
Product	Overall, the second-ranking dependent factor with an "Indifferent" attribute but represented 30,9% of customer satisfaction	

****Critical Success Factors**

Table 5.24 summarises all the results discussed in this quantitative section. It highlights the most represented demographical profiles, the above-average factor rankings (otherwise referred to as critical success factors) and the most influential independent variables discussed.

In detail, the table highlights that South Africa showed a stronger representation among younger females and mid-income earners, while Germany reflected a more mature demographic with a lower education profile. With regard to omnichannel preferences, particularly online shopping alternatives and information search options, these emerged as influential across both contexts. South African respondents placed greater emphasis on product functionality; however, authentic localism and equity were rated as average in South Africa, whereas they were considered above average and identified as critical success factors in Germany. Additionally, product exclusivity was found to be salient in both samples, though more pronounced in South Africa.

Finally, the implications of the kano model results, which implicated customer satisfaction, were also summarised in table 5.24, revealing that while *place* and *product* were classified as 'Indifferent' attributes, they still accounted for 32.6% and 30.9% of customer satisfaction respectively, whereas *price premiums* were considered a 'reverse' attribute, suggesting a potential tension between value perception and willingness to pay.

Overall, this quantitative section covered the first and second objectives to identify consumer needs to patronise retailing fashion design entrepreneurs and explore/analyse the critical success factors for retailing fashion entrepreneurs.

5.4 QUALITATIVE ANALYSIS

This qualitative research section endeavoured to shed light on the unique insights gained from interviews conducted with fashion design entrepreneurs in South Africa and Germany. As mentioned, the qualitative data for this study was collected through in-depth semi-structured interviews.

The interviews were conducted in-person or online, using various online meeting platforms, recorded and then transcribed in preparation for data analysis. This study employed Nvivo 12, a qualitative data analysis software, to analyse the collected data. The utilisation of this tool enabled a systematic examination of the interview transcripts, which were first coded, allowing for the identification of emerging themes,

patterns, and variations in the experiences of retailing fashion design entrepreneurs. As the analysis unfolded, the qualitative analysis findings were presented, providing an understanding of the factors and support structures influencing retailing fashion design entrepreneurs' success in South Africa and Germany.

5.4.1 Sample Description

By interviewing several different retailing fashion designers with specific needs, a comprehensive exploration of the varying experiences of each retailing fashion design entrepreneur provided valuable insights into the intricacies within the local fashion, retail and support structures required in each country. As a result, after the interviews were conducted, it was advantageous to categorise participants as emerging with less than 10 years of retail experience, established with more than 10 years of retail experience and eminent retailing fashion design entrepreneurs with more than 20 years of retailing experience. This was done to differentiate between the needs and support required at specific retail levels.

Overall, fifteen retailing fashion design entrepreneurs were interviewed in both countries. In South Africa, nine retailing fashion design entrepreneurs were interviewed, with two interviews taking place online and seven interviews taking place in person. Of the nine retailing fashion designers, two were considered emerging, three are deemed established, and five are regarded as eminent retailing fashion design entrepreneurs.

In Germany, six retailing fashion design entrepreneurs were interviewed, with three interviews taking place online and three in-person. Of the six retailing fashion designers, three were considered emerging, three are deemed established, and no eminent fashion design entrepreneurs were interviewed in Germany. Table 5.25 summarises the difference between the retailing fashion designers interviewed in South Africa and Germany.

Table 5.25: Categories of Retailing Fashion Design Entrepreneurs

	South Africa	Germany
Emerging Retailing Fashion Designers	2	3
Established Retailing Fashion Designers	2	3
Eminent Retailing Fashion Designers	5	-
Total	9	6

5.4.2 Data Interpretation and Narratives

As the qualitative analysis followed the deductive approach, the coding involved predefined codes based on the applied theories and propositions. Using Nvivo 12 codes also called nodes, were generated after the transcription, which represented propositions and were then systematically applied to each factor. Throughout the process, data were regularly reviewed to ensure consistency and accuracy. Finally, the codes were refined and updated as required.

This section analysed data to answer objectives 3, 4, and a portion of objective 5, which were to *classify the type of external support required in Germany in comparison to South Africa* and to *determine retailing fashion designers needs from external support in Germany compared to South Africa*, to ensure the retailing fashion design entrepreneurs achieve critical success in retail. Moreover, to fulfil the aim of this study, which was to *propose appropriate external support to sustain critical success factors of retailing fashion design entrepreneurs*. It is important to note that the qualitative analysis only involved the critical success factors identified through the quantitative analysis. Resultingly, the qualitative analysis focused on place, product, and price as the three factors identified as critical (above average or reverse), either through factor rankings or the kano model. Appendix F outlines the semi-structured questions for critical success factors covered during the interviews. Concurrently, table 5.26 summarises propositions tested for each question and codes for each proposition.

Table 5.26: Proposition and Codes Summary

Proposition		Codes	
Fashion Retail Place			
P1	The success of retailing fashion design entrepreneurs was due to their business models, with the involvement of <u>industrial partners</u> .	N1	Business Partnerships
P2	Retailing fashion design entrepreneurs who recognised the <u>need for omnichannel</u> retailing recognised the need for external support.	N2	Omnichannel Support Needs
P3	For fashion designers to succeed within their retail place, they recognised the <u>need for external trading/distribution support</u> .	N3	Trading/Distribution Support Needs
P4	For fashion designers to succeed within their retail place, they recognised the <u>need for business support</u> .	N4	Business Support Needs
P5	Retailing fashion design entrepreneurs regarded the <u>number of locations</u> they operated from as a critical factor for success.	N5	Retail Locations
Product			
P6	Retailing fashion design entrepreneurs recognised <u>the need for sales forecasting information</u> from distributors as a critical factor for their success.	N6	Sale Forecasting Information Needs
P7	Retailing fashion design entrepreneurs recognised the <u>need for sales reports</u> from distributors as a critical factor for their success.	N7	Sale Report Support Needs
P8	To critically succeed with their five slow fashion criteria, retailing fashion design entrepreneurs recognised the <u>need for external production/manufacturing support</u> .	N8	Production/Manufacturing Support Needs
P9	To critically succeed with their five slow fashion criteria, retailing fashion design entrepreneurs recognised the <u>need for external sourcing support</u> .	N9	Sourcing Support Needs
P10	To critically succeed with their five slow fashion criteria, retailing fashion design entrepreneurs recognised the <u>need for sustainability support</u> .	N10	Sustainable Product Support Needs
Price			
P11	Retailing fashion design entrepreneurs offered <u>price premiums</u> and were <u>determined with those prices</u> .	N11	Price Range Determination
P12	Retailing fashion design entrepreneurs recognised the <u>need for external pricing support</u> to price their slow fashion products successfully.	N12	Pricing Support Needs
P13	Retailing fashion design entrepreneurs used <u>different pricing strategies to position themselves</u> with specific consumers.	N13	Pricing Strategy

Additional questions related to external support structures in each country were also included in the questionnaire as closing questions and to allow additional context and input from retailing fashion design entrepreneurs, which can again be found under Appendix F. Table 5.27 summarises the general questions related to external support and codes associated with those questions.

Table 5.27: General External Support Questions and Codes

Additional Codes			
General External Support Question		Code	
Q10/11	Where do retailing fashion design entrepreneurs usually find out about external support available? Which external support was applied for and obtained in the past?	N14	Attainable Support Information
Q12/13	Which external support was applied for and NOT obtained in the past? What are the challenges of obtaining and working with external support?	N15	External Support Challenges
Q14	How has external support made a difference to business?	N16	External Support Impact
Q16	How much financial support is required, and the needs it would meet?	N17	Financial Support Needs
Q15	What do you see implemented with current external support?	N18	Implementation Recommendations

5.4.2.1 Fashion Retail Place

P1_N1: Business Partnerships

Both South African and German retailing fashion designers recognised the importance of partnerships in their businesses. Whether emerging, established or eminent, both countries acknowledged the benefits of collaborating with others for mentorship, cost-sharing, risk mitigation, and market access. The difference, however, was in the nature of partnerships, the scope of collaborations, formality and organisation.

In terms of business partnerships in South Africa, the interviews highlighted the various ways in which fashion designers implemented business partnerships, which included mentorship, cost-sharing, risk mitigation, and collaborative ventures with retailers. Generally, emerging designers focused on mentorship and training, established designers highlighted the importance of cost-sharing, while eminent designers showcased a broader range of collaborations, international ventures, and strategies for business expansion, often involving shared risks and responsibilities. These distinctions illustrate the evolving roles and challenges designers face at different stages of their careers in the South African fashion retail industry. The comments below summarise some notable points made by fashion designers regarding business partnerships in South Africa:

- “I’m in that position where I’m being mentored and supported structurally by [eminent retailing fashion designers].”
- “There were shared partners at the beginning. So, there was like shared risk (...) mitigated having to seek out any (...) external funding.”
- “[The partnership with a prominent brand] helped us to be able to do our stores from the money that we got. Because I always say when I get an investment, I want to say. What did I do for the brand? What do I do for myself? [Now] I have stores that came from that project.”

The analysis revealed distinct differences in the nature and scope of business partnerships between emerging and established retailing fashion designers in Germany. For instance, emerging designers often relied on informal networks and community support, participating in ad-hoc opportunities like pop-up events organised by other small business owners. These partnerships were described as less formalised and more spontaneous, focusing on immediate support within the local community.

In contrast, established designers in Germany engaged in more structured and strategic partnerships, forming alliances with agencies offering comprehensive support for pop-up stores and market access to various areas in Germany, as well as networking with other fashion designers and distributors for mutual growth. These partnerships were often more formal and organised, involving contractual agreements and long-term relationships aimed at providing structural assistance, strategic guidance, and discussions on business decisions and industry dynamics. Therefore, while fashion designers valued partnerships at all stages, the nature and depth of these collaborations varied based on the designers' establishment level within the industry. The following quotations summarise the findings in Germany:

- “So, there was a lot of support through the community of small business owners...”
- “...they [partners] really try to find all the connections for the [retail] designers, but it's really hard. It's really tough. So, they help a lot more. I think they are really good communication partners. For me, I can discuss my decisions on my business with them and we also talk about how to look at different

developments or dynamics in the fashion industry and it's a cooperation that goes beyond selling..."

- "So it was a in a way sustainable way of working, you know, kind of like, we [the fashion designer and distributor] grew together, they support us a lot."

P2_N2: Omnichannel Support Needs

In terms of the responses related to omnichannel support and needs, various perspectives were captured in connection to online requirements among fashion design entrepreneurs. There was a variation in the depth of knowledge related to omnichannel retailing. To varying extents, all designers demonstrated some level of awareness and understanding of omnichannel retailing (even when unaware of the term) both in South Africa and Germany. However, eminent designers in South Africa showcased a more comprehensive understanding of omnichannel complexities than their German counterparts, particularly in integrating various channels for a seamless retail experience. Both countries recognised the importance of seamlessly integrating multiple channels to enhance customer experience and operational efficiency within their businesses. Additionally, both groups emphasised the significance of technology in accommodating clients, providing post-sale services, and offering convenient choices to customers.

In South Africa, eminent designers, in particular, showcased a more comprehensive understanding of the complexities involved in integrating various channels for a seamless retail experience. Though not every designer explicitly used the term "omnichannel", there were unknowingly intentional efforts across emerging, established, and eminent designers to incorporate various elements of omnichannel practices into their operations. Those efforts reflected a recognition of the importance of seamlessly integrating different channels to enhance customer experience and operational efficiency.

Emerging designers emphasised seamless communication and in-person interaction, with a need for dedicated staff that facilitated the shopping process. Established designers acknowledged the slow adoption of omnichannel practices and stressed the importance of technology for accommodating clients and providing post-sale services. They also highlighted the need for a proactive approach to offering convenient choices

to customers. Eminent designers navigated the complexity of omnichannel operations, emphasising the importance of good websites, social media, and engagement. They noted the diverse skill sets required, including branding, back-end functionality, and digital marketing, potentially necessitating outsourcing.

Eminent designers additionally saw online as a learning curve for understanding the customer base and emphasised the value of online feedback. Some also explored innovative practices such as tracing product origins through barcode scanning, promoting transparency and storytelling. The comments below summarised the sentiments of the retailing fashion design entrepreneurs in South Africa:

- “It's exactly what happens in... [our store], but I didn't have a label for it.”
- “It's so complex nowadays because it's not just one thing that you need. You know, you've got to have those facilities up... So those three, the branding, the backend, and then the marketing are three different things that are not always done by the same company or person. And then besides those three things, you've got the in-house staff where you need a social media manager, that is in your environment... but you also can outsource that. Somebody (..) focused on looking after all the touch points of those things to answer any questions or any customer queries to follow through on sales.”

Established retailing fashion design entrepreneurs in Germany expressed a need for personnel assistance and education in navigating omnichannel strategies, particularly in managing hybrid models. It was found that omnichannel retailing proved to be a challenge for retailing fashion design entrepreneurs, navigating a relationship between stockists, customers loyal to the stockist brand and their own online channels. This highlighted a gap in the availability of B2B2C omnichannel opportunities for both emerging and established retailing fashion design entrepreneurs.

Overall, in Germany, both emerging and established retailing fashion designers shared some common support needs regarding omnichannel strategies, such as the importance of physical locations to build trust with customers and foster a sense of community, suggesting the necessity of a combined online and offline presence. For emerging retailing fashion designers, however, the emphasis was more on the

accessibility of government-supported spaces to showcase their products. Interestingly, some emerging retailing fashion design entrepreneurs used omnichannel as a backward integration retail strategy, processing customers' orders first to gauge and fund the manufacturing capacity. The following excerpts from the interviews in Germany summarise the omnichannel support needs of retailing fashion design entrepreneurs:

- “I think it would have to be spaces opening up for small businesses, and then those spaces also being (...) funded by the government or supported or (...) somehow made cheaper or made more accessible, so that people can actually go there...”
- “Actually, (..) first of all, everything that is on display, you need to buy online, but the bags and the caps they can pick up immediately, and the shirts, the jacket and pants would be shipped to you [the customer].”
- “An assistant [to make omnichannel happen]. I really think that the biggest mystery in Germany is to tell fashion designers that it is possible to do a label on your own. It just simply isn't.”

P3_N3: Trading/Distribution Support Needs

Both South Africa and Germany were found to be wary of commission-based selling arrangements and found entering international markets complex, due to a lack of contacts and market-specific regulations.

Across all stages, retailing fashion design entrepreneurs in South Africa face shared challenges and dynamics, although the journeys were individually unique. One prevalent theme was the universal struggle with distribution, involving issues such as stock management, understanding consumer preferences, and navigating sales complexities. Notably, there was a collective observation of the enduring preference among South African consumers for physical stores and traditional retail spaces such as malls.

Global expansion emerged as a common aspiration among eminent retailing fashion design entrepreneurs, emphasising the significance of international trade shows. Eminent retailing fashion designers also recognised the need for numerous trading

points to maintain stock flow. While online platforms offered benefits such as improved cashflow and customer information, designers at various stages encountered challenges, including the high costs and staffing needs associated with maintaining online stores. Emerging retailing fashion design entrepreneurs found it overwhelming to deal with dispatch and detailed/specific/sensitive delivery notes, while operating an online store alone or with limited staff.

Furthermore, retailing fashion design entrepreneurs expressed concerns with regard to the level of industry support, feeling undervalued and lacking critical information, such as boutique contacts. Trust from consumers in online shopping remained a common challenge, despite recognising its benefits, reflecting an industry-wide need to establish confidence in online transactions in South Africa. The following comments summarised the findings discussed:

- “The dispatch and distribution processes... There's preparing delivery notes... detailed, specific, and sensitive. And I found that I make mistakes quite often. Because I have so much going on. And with the plans online for the online store, I obviously need someone to manage those orders. Like a sales rep, or something.”
- “The bigger vision is that if I get an order for 300 units from international, then manufactured in the country... What does that mean? It means I've employed people; I've increased manufacturing. And the boxes are being ticked on a higher level because now it's not only about South Africa, it's about the international brand positioning.”
- “I would think you need a lot of feet in your store, or you've got to open at least 10 stores. So that you can supply them, otherwise you're not going to sell, you going to sit with stock in the warehouse.”

There were noticeable differences in trading/distribution support needs between emerging and established retailing fashion designers in Germany. Emerging retailing fashion designers expressed a need for accessible platforms to reach a broader audience, focused on catering to international markets such as America. They highlighted challenges in meeting the high requirements of major platforms such as Zalando and ASOS for smaller brands, which limit their access to large-scale

distribution channels. Additionally, they expressed concerns regarding the dominance of large retailers and marketplaces, questioning the long-term viability of smaller, community-oriented platforms.

While also facing challenges, established designers primarily discussed strategies for navigating the wholesale market and expanding into international markets. They emphasised the importance of contacts and networking events in establishing relationships with retailers and distributors. Additionally, they mentioned initiatives supported by the government, such as workshops and local retail spaces, to provide support and resources for fashion designers. Additionally, entering the wholesale market, particularly in international markets such as the USA, was found to be a common concern and regarded as complicated, due to the lack of contacts and understanding of market-specific regulations and tariffs.

In Germany, emerging retailing fashion designers generally focused on gaining visibility and access to platforms, while established designers sought to navigate complex distribution channels and expand their international presence with the support of government initiatives and strategic partnerships with competent agents. The following statements from Germany best highlight the findings'

- "But, it's [commission] such a losing game for young designers, like they [retailers] have no responsibility to promote it [designers' products] ... If it doesn't sell, they [retailers] send it back to you."
- "Well for me it would be very important to come and now into the order business or not into the b2c."
- "I think it's really, really hard, if not impossible, to find a good agent [for international distribution]."

P4_N4: Business Needs Support

In both Germany and South Africa, retailing fashion designers had some similarities regarding business support needs. Both countries required some form of financial assistance for various aspects of their businesses, recognised the value of industry connections for growth opportunities, and sought access to specialists and educational programmes to address business challenges.

Emerging fashion designers in South Africa focused more on understanding the financial landscape, established designers on securing skilled personnel and managing logistics, and eminent designers on addressing educational gaps (primarily of skilled workers and emerging fashion designers) and undertaking business restructuring. Generally, only 50 percent interviewees in South Africa had attained a form of external business support, with most designers attaining that support from each other (emerging fashion designers attaining business support from eminent fashion designers or established fashion designers attaining support from other established fashion designers). Notably, no established designers had attained external business support outside their fashion networks, while four of five eminent fashion designers had previously attained some form of business support from different external sources. Below are some statements that support the stated findings:

- “I made the agreement for 12-month financing and backing... of them [eminent retailing fashion designers] assisting me. My only job is to find good CMTs and supply designs/stock. Otherwise, everything, the space here with an office, I have my cutting table here, I have access to equipment, I have access to everything that I need... like everything... But the one thing that the business [still] needs is the financial outlook, the financial support, in terms of managing, knowing all the things that I need to do to truly succeed in less painful ways.”
- “We were happy to grow slower and then retain control. If you sometimes get support, you either have to pay interest, it depends where you go, obviously. There are ways in which we've utilised our bank, but not individuals.”
- “But based on the internship program that I run and getting these young designers, they don't understand what the business of fashion is about. Whereby you have to do a collection, you have to do costing, line sheet, lookbook, sales, production, distribution, that is not part of the curriculum. And these are things that we, as the older generation who had to find out ourselves... So that's where our biggest challenge in South Africa is, that's the problem that we have, understanding the value chain of the business of fashion, how it starts and how it's supposed to go.”

The interviews with retailing fashion design entrepreneurs in Germany shed light on several critical business support needs. One notable challenge highlighted was the difficulty in meeting the regulatory requirements imposed by larger retailers, particularly concerning obtaining necessary certifications and insurance coverage. This hurdle was particularly pronounced for emerging brands, which struggled to navigate the complexities of compliance. Additionally, retailing fashion designers expressed a need for streamlined databases or resources to facilitate their research and access to relevant retail contacts. They emphasised the time-consuming nature of this process and the challenge of finding suitable retail outlets for their products.

Moreover, financial support and business coaching emerged as significant factors in supporting entrepreneurship. Furthermore, one of the most significant business support received, was the patience and direction from distributors who were determined to stock specific fashion designer's products. The following statements from retailing fashion design entrepreneurs summarise the findings:

- “And then I got coaching... That was also quite good. I only had to pay a little bit [of] money to this... It was also funded. And she [the coach] also helped me to think about the business strategies.”
- “They [big retailers] need all kinds of certificates... just like things that are not easy to acquire for small brands. Especially for young brands...”
- “The thing I think with smaller brands (...) because people know that you're small and you don't have the resource of being too professional, to provide everything in a certain timeframe and they're [distributors] kind of like, it's like a small product[ion]. We understand it takes longer, most of them were very understanding, if mistakes are happening.”

P5_N5: Retail Locations

The main commonality between all the retailing fashion design entrepreneurs (both in South Africa and Germany) was that they operated from online stores and recognised the importance of prime locations nationally and internationally. However, the number of retail locations each retailing fashion design entrepreneur operated from varied according to their business needs, strategies and goals.

In South Africa, the retailing fashion design entrepreneurs employed a mix of strategies, including physical stores, online platforms, collaborations with other designers, and various boutiques, reflecting a diversified approach to retailing. For instance, some emerging fashion design entrepreneurs were retailing from more outlets than established retailing fashion design entrepreneurs or even eminent retailing fashion design entrepreneurs. Conversely, though the emerging fashion designers operated from more locations than most established and eminent retailing fashion designers, they expressed that the decision compromised their online operations or presence. In contrast, eminent retailing fashion designers gradually grew their prime retail locations and presence at their own comfortable and cautious pace.

Several retailing fashion design entrepreneurs in both countries mentioned the impact of COVID-19 on their retail locations. It became apparent the effects of COVID-19 on retailing fashion designer entrepreneurs were multifaceted, and their responses were shaped by various factors, including the nature of their businesses, the markets they catered to, and their individual circumstances. As a result, the impact COVID-19 had on fashion designers' locations varied across the statements, with most fashion designers shifting to online platforms as a response to the limitations imposed by the pandemic. Additionally, there were several closures and changes in physical stores, either by consolidating separate locations into a single space or temporarily closing stores. The adaptation to the post-COVID environment thus included evaluating the performance of different retail locations, considering new spots, and being cautious in their approach to physical retail.

Retailing fashion design entrepreneurs in South Africa indicated an interest in various locations from which they wished to operate. They mentioned both current retail locations and potential expansion or desired locations. Some fashion designers expressed interest in specific areas or types of stores (such as lifestyle stores), while others discussed considerations such as prime locations, international locations, independence units, and chain stores, as well as collaborations with well-known brands. The discussions reflected a mix of strategic planning, market positioning, and the importance of geographical perception for successful retail operations, as seen in some chosen statements:

- “Currently, we sitting at eight stores, and I've also recently joined another store. The 10th one is struggling... Not having enough stock for myself.”
- “At the moment, everything is online. The only spot we're doing now is at the waterfront. So that's obviously post-COVID, and also just kind of sitting and looking at what we've done before. So, before COVID, we were in (..) Rosebank, Menlyn and Sandton. Then we also got into [2 other retailers] ...”
- “Even touching on location, with our previous stores, they won't really prime. They always speak of Location, Location, Location, when opening up a store... Location, it's also perception, right? So, like, these guys [retailers] are in this area within a certain mall or certain place, geographically, then these are big players and customers know they're gonna get their money's worth because of where these guys [retailers] are situated.”

In Germany, the majority retailing fashion design entrepreneurs actively sought out wholesale retailers, facing challenges in finding suitable partners and expressing reluctance towards consignment or commission-based sales arrangements.

International expansion played a significant role for most retailing fashion designers, with efforts directed towards securing contracts with retailers in locations such as the USA, Japan, Korea and the UK. Trade shows and fashion weeks also served as crucial platforms for exposure and networking, with government funding facilitating participation in events abroad. Notably, pop-up stores were more popular amongst retailing fashion design entrepreneurs in Germany, with fashion designers establishing a physical presence and brand visibility, particularly in markets where their brands were not yet well-known.

Meanwhile, established designers recounted experiences of starting in shared shop systems, eventually transitioning to their own shops, and collaborating with agencies for pop-up stores across various cities in Germany. However, the main interest in retail locations for retailing fashion design entrepreneurs in Germany was based on obtaining wholesale orders with various stockists or retailers that aligned with their brand identities. The following statements outline the goal of retail locations for fashion design entrepreneurs in Germany:

- “[We] very much in the process of looking for wholesale retailers, which is so hard. The thing is, doing commission-based sales is just not in my roster unless you're like [a big retailer].”
- “So social media, and then the idea would be to grow the community there, and then slowly move traffic to the online shop as well. But the reason why I wanted to do a pop-up is because it's just better to bring people together, I think, as a new brand, especially in Berlin, in Germany, like, people don't even know us yet.”
- “Japan, I think depending on the season, it's about like 6 or 7 shops, sometimes 10 depending on the collection... Other market will be in the United States. I have a bit bigger client in New York, one in Portland... and the other ones I have is in Hong Kong I have one in Europe...”

5.4.2.2 Fashion Product

Under fashion products, the themes were strongly related, and as a result, the nodes were merged after the coding process. This was done to provide a streamlined and holistic perspective, which allowed a comprehensive understanding of interconnected concepts that mirrored the natural connections between the different themes.

The first themes subsequently merged, were *sales forecast support needs* (P6_N6) and *sales report support needs* (P7_N7) under the new theme characterised as *sales information support needs* (P6/7_N6/7). The two themes were merged, as they both revolved around the information needs of retailing fashion design entrepreneurs concerning sales data, which resulted in overlapping comments. *Production/Manufacturing support needs* (P8_N8), *sourcing support needs* (P9_N9) and *sustainability support needs* (P10_N10) were merged under one theme retitled *sustainable sourcing, manufacturing/production support needs* (P8-10_N8-10). Combining the three themes allowed for a comprehensive exploration of the interconnected aspects related to production, sourcing, and sustainability, which then reduced fragmentation by not treating the themes in isolation, as they appeared to often be interdependent during the coding process.

P6/7_N6/N7: Sales Information Support Needs

In both South Africa and Germany, retailing fashion designers prioritised sales reports as crucial sources of insights for decision-making. They also recognised the importance of sales forecasting, albeit to varying degrees. Both regions shared a common focus on understanding and leveraging customer insights from sales data to inform product development, marketing efforts, and overall business strategies.

Based on the analysis in South Africa, fashion designers placed a significant value on ground-level insights into actual sales. The sales report information served as foundational strategic decision-making and collection planning information applied in sales forecasting. As one of the fashion designers mentioned, *“You have to turn those trends into sales, it's like intrinsic”*.

Regarding support needs in this area, retailing fashion design entrepreneurs in South Africa suggested forecasting support, particularly in determining the optimal stock units and aiding in production planning. Additionally, designers emphasised the importance of strategic planning and analysis, indicating a need for guidance in identifying best sellers and avoiding unnecessary new collections. Collection planning emerged as another area where designers sought support, with an emphasis on analysing bestsellers and strategically launching collections. Designers highlighted the importance of understanding and influencing consumer behaviour, indicating a need for support in shaping product narratives and guiding customers on product consumption. Last, e-commerce data were seen as valuable for demographic and sales insights, with a desire for assistance in effectively utilising the available information. The following responses best capture the essence of sales information support needs:

- “...Always look up which dresses do well and sometimes just change the silhouette a little bit. Because customers, weirdly enough, will always go back to the same thing... So, it's not always about reinventing the wheel... And that also, I think, stays true to what your brand is and what your aesthetic is. So, customers are still able to recognise it and still go back to it.”

- “I think primarily sales report, and then secondary trend forecast... Trends are very important and I respect and embrace them, but they are not the end all and be all for me for the business.”
- “Demographic [Found through e-commerce site]. It showed me exactly where my clients are from, and we just did that exercise recently. Actually, I did not know that my clients were from the north like maybe I should have a shop in the north but a chunk of them were from the North of Johannesburg. It also tells me, you know, popular sizes, it quickly shows me what is a popular garment, and also a popular price point. You can get just about anything. I think just tech support [that is needed to understand the system better].”

In Germany, for some emerging retailing fashion design entrepreneurs, their starting point was creating a brand narrative or story that resonated with customers, as opposed to solely focusing on the product, therefore, the retailing fashion designers initially concentrated on driving sales through storytelling, meaning understanding customer sentiment and preferences was crucial for them. Sales forecasts were relied upon to gauge customer trends and preferences. Additionally, they acknowledge the significance of getting to know their customer base through sales reports and integrating best sellers as staple items within their collections.

Established retailing fashion designers focused more on understanding what products sold best to inform their design process. Thus, they relied on detailed sales reports and customer feedback to guide their decisions. They prioritised producing items based on demand, rather than following trends. Overall, both aspects of sales-related information were mentioned equally in Germany, with fashion designers expressing balanced views between sales forecasting and sales reports, contributing to a fashion business's overall success and profitability. The following extracts from the interviews in Germany highlight the findings:

- “It has much more been about the vibe in a similar sphere. Do they [customers] have a similar feeling to it? Is there, like, a sensibility for like storytelling... So in the end, I still have this thing of like this brand is more about storytelling, and the product is almost secondary.”

- “Sales Forecast, I would say [sales information most relied on]. I mean, every dealer, online or offline, they have certain network of customers that are returning, or they have...”
- “The sales report because there we get to see what products people like. And that really helps when designing the next. Because right now, one of our plans is to have like a best seller. Right now, we're not there yet... So, we're not sure what can be the main revenue driver. But I think that's the most important information because that way we can obviously then make sure we always have that available, and then we experiment and defend new design.”

P8-10_N8-10: Sustainable Sourcing, Manufacturing/Production Support Needs

Retailing fashion design entrepreneurs in Germany and South Africa were found to focus on different aspects of sustainable sourcing and manufacturing/production. In South Africa, they articulated a keen interest in sourcing locally produced fabrics and fabric printers, which were genuine and responsibly procured, thereby enhancing the credibility of designs. In the context of sourcing assistance, designers expressed challenges in locating Cut, Make, and Trims (CMTs), fabric suppliers and printers that aligned with their sustainability and quality goals. The need for support in identifying and establishing connections with CMTs, local fabric suppliers and fabric printers committed to ethical and eco-friendly practices also emerged as a common theme. In addition, education surfaced as an essential factor for aspiring fashion designers in higher education to be well-informed regarding sustainable sourcing production/manufacturing practices. Second, consumer education and communication (through promotion) were highlighted as essential to emphasise the significance of retailing fashion designers' sustainable practices.

The emphasis on functionality resonated with designers, who expressed a commitment to creating fashion items that were not only visually appealing but also possessed durability, versatility and longevity. Turning to manufacturing and production support needs, the focus extended to the intricacies of CMT services and the actual crafting of garments, as quality appeared to be an issue. The retailing fashion designers in South Africa recognised the potential for fashion to be a vehicle

for positive change, where working with local craft people or local CMTs with authenticity surfaced as a guiding principle in their choices.

The notion of exclusivity resonated among some fashion designers, who spoke of the significance of limited edition runs and unique designs. This perspective indicated a departure from mass production models. Interestingly, three of five eminent retailing fashion designers did not identify their brands as being completely exclusive, though they produced limited unique items. Those eminent fashion designers believed it was necessary to remain accessible to all consumers, as they defined exclusivity as restricted access to consumers, with no repeated products, as stated by one of the eminent fashion designers: *“I want a nice balance between being exclusive and accessible. I don't believe in being completely exclusive and being this untouchable brand... Like, I want to be so accessible and so exclusive at the same time.”* The commitment to equity when producing fashion products aligned with the retailing fashion design entrepreneurs' concerns about fair labour practices. The interviewees underscored their dedication to ensuring that every stage of the production process adheres to ethical standards.

- “Products [the challenge] would be fabric availability. We are so limited with fabric availability.”
- “Ethically from a value chain, from manufacturing to retail... The manufacturing arm is important... You've got to inform your customer what is the significance of manufacturing here instead of China.”
- “... As an established designer, you've got to set yourself apart with the quality of fabrics that you use to print your signature prints on.”

Interestingly, the focus for retailing fashion design entrepreneurs in Germany was more on sustainability and manufacturing/production support needs, than on sourcing support needs. Therefore, this node for Germany could be termed *sustainable manufacturing/production support needs*. On the whole, both emerging and established designers in Germany required support in various aspects of sustainable manufacturing and production, including infrastructure development, skills enhancement, access to sustainable materials, and obtaining certifications to showcase their sustainability efforts to consumers. It was found that obtaining

sustainability certifications and marks could be costly and challenging, even when fashion designers were already implementing sustainable practices.

Further discussion into sustainability practices highlighted authenticity and locality in their production processes. Some fashion designers even opted for made-to-order models through their online retail platforms to minimise waste and avoid overstocking. Last, with some innovative production practices, the fashion designers felt education regarding sustainable fashion production and consumerism would be valuable for increasing awareness and appreciation of sustainable products. The following quotations, related to sustainable manufacturing/production support needs, elicited some prolific comments from retailing fashion design entrepreneurs:

- "Authenticity is crucial because other aspects like production chain infrastructure are difficult and require consistent effort and funding."
- "I'd say infrastructure. Because it's a hard one to even find manufacturers that are eco-friendly, and obviously, eco-friendly materials are expensive, to say the least. [Support] like grants or just industry connections to these manufacturers that do produce that. But honestly, the bigger picture would be to actually just produce it myself."
- "Obtaining sustainability certifications and marks can be costly and challenging, even when already implementing sustainable practices."

5.4.2.3 Fashion Prices

P11_N11: Price Points Determination

In South African retailing fashion design entrepreneurship, price points varied among individuals interviewed, with the lowest price point being R290 from one of the eminent fashion design entrepreneurs, with the strategy to remain relatively accessible to the average consumer, instead of highly exclusive. On the contrary, the highest price point was R28 000, also from an eminent retailing fashion design entrepreneur who had a different strategy and considered their brand an exclusive premium brand. Some emerging and established retailing fashion design entrepreneurs in South Africa offer a broad spectrum, from below R800 to R20 000, with the latter being runway pieces or one-of-one pieces, ensuring a mix of accessible and premium exclusive options.

The overall feelings with regard to lower and higher price points among the South African fashion designers interviewed were mixed. While a few designers expressed openness to providing a range of price points to cater to a diverse customer base and enhance accessibility, most showed reluctance or hesitancy toward offering lower-priced items. Generally, the comments from the retailing fashion design entrepreneurs in South Africa indicated a level of determination in establishing their respective price points. These diverse approaches showcase the intricate balance retailing fashion design entrepreneurs strike between affordability, quality, and brand positioning in the South African market, as mentioned in the following quotations:

- “I think I've always felt like it should be attainable, and I know not everybody's gonna buy those dresses over R2 000, but we want to still be a brand that people can afford.”
- “Well, actually, I don't want to get to a lower price point. I mean, she [the Planner] wants me to, but I would like to get to repositioning the brand that it's more high-end...”
- “I think I'm very comfortable. Like I grow with my customers. So, every year if like it [the price] goes up a little bit, not enough to have a big difference... Like we've got our high-end R15 000 jackets, and then we've got our R650 tops. Like there's something for everybody.”

The price range for fashion designers in Germany varied widely, depending on factors such as product type, target market, and perceived value. The lowest price mentioned was from an emerging fashion designer, which was €25 for specific items, while the highest price points mentioned by established fashion designers ranged from €300 to €3 000. These price points reflected the diversity of products designers offered, including items such as small bags, suits, dresses, and bridal wear.

As in South Africa, several emerging retailing fashion designers in Germany expressed contentment with their current price points. They noted that they felt they had found a favourable balance between affordability and perceived value and wished to remain in the mid-range category, not too expensive but not cheap either. On the contrary, established retailing fashion designers mentioned the potential for increasing profitability by entering the luxury segment, albeit with the acknowledgement this

would require significantly raising prices. Generally, retailing fashion designers in Germany catered to different market segments and met various consumer preferences and expectations. Ultimately, while both emerging and established retailing fashion designers prioritised profitability and market positioning, their specific price points approach varied, based on factors such as brand maturity and market presence, as summarised in the following quotations:

- "At the moment? I'm good with it [price range]. I think we have like a nice in-between thing (...) not too expensive, but not cheap."
- "I'm always thinking about how to come into luxury. Because they're the people they just always have money, and they always want to get rid of the money. My prices are too low. So, I am right now in a process where I'm getting more expensive."
- "So, the lowest will be around maybe €100 and the highest will be maybe 700, like for a coat or like a like a very complicated jacket."

P12_N12: Price Support Needs

Both countries emphasised the significance of effective communication and engagement with customers in justifying prices and creating a sense of product exclusivity. In addition, both also recognised the importance of external expertise, personal networks and support in refining pricing strategies to meet the demands of the fashion market.

With regard to pricing support needs in South Africa, overall, the retailing fashion designers recognised the importance of external support, whether from consultants, professionals in the field, or collaborative efforts among fashion designers. There was a shared sentiment regarding the complexity of pricing, emphasising the psychological and emotional aspects involved in setting prices for their fashion products.

There was, additionally, a link between sourcing and price support needs, as using more cost-effective materials appeared to be a consideration in achieving specific price points and making products more accessible to customers. The following statements summarise the overall findings of pricing support needs in South Africa:

- “Pricing was such an issue for a long time, especially when I was just buying fabric over the counter. I wish I could go to a workshop. First of all, in South Africa, for the South African market. Look at something relevant... Because general information also does not help us. It really doesn't; it confuses us even more. I felt like I needed someone to really hold my hand (...) and it was good to sit down with an accountant doing that. I wanted to sit down with a retail guru.”
- “But I think it would be nice to have five designers shared different ways of how they do their pricing. And you can take whatever works for your business. You don't want your garments to be expensive. You want people to be able to afford it. Because what's the point? You want people to wear it. But you also don't want to cut your head off. And pay in everything.”

With a slightly different approach, the interviews in Germany shed light on the different assistance and support from personal networks retailing fashion design entrepreneurs received for their pricing strategies. Concerns were raised with regard to the importance of factoring in margins adequately, particularly for brands transitioning from online to wholesale channels, highlighting the necessity of sustainable pricing strategies.

Overall, designers emphasised the value of external support and expertise they had received, such as advice from experienced fashion buyers or professionals with knowledge in international markets, to fill knowledge gaps and enhance business operations. Established designers discussed challenges in pricing adaptation, particularly in response to factors such as inflation and evolving consumer preferences, underscoring the need for flexibility and strategic pricing adjustments.

- “I have a friend here... And she used to be professional fashion buyer, like high-fashion buyer. And she sat me down (...), and that's how I learned.”
- “Because I realised some brands get into trouble because they start off online, and then maybe they didn't factor in the margins enough...”
- “People now have less money and they don't really want to pay so much. So yeah, this is a very difficult question right now because I think that we have a very, very difficult time in society.”

P13_N13: Pricing Strategies

Retailing fashion design entrepreneurs in Germany and South Africa recognised the complexities of pricing strategy development. In both contexts, pricing strategies were tailored to consider factors such as production costs, market demand, and competitor pricing to ensure sustainable margins and competitiveness.

In South Africa, each entrepreneur considered various factors, such as customer feedback, the nature of their designs, the balance between affordability and luxury, and the need for brand alignment within their pricing strategies. The strategies ranged from markup adjustments to accommodate different product categories, to considering unique fabric offerings influencing pricing decisions. The most popular pricing strategies mainly touched upon aspects of cost-plus pricing, competitive pricing strategy, value-based pricing, and some elements aligned with penetration and high-low pricing strategies. The specific mention of certain pricing strategies varied, based on the designers' individual approaches and business models.

One of the most critical sentiments from the interviews was the need for the pricing strategy to be efficient, understandable and simplified for retailing fashion design entrepreneurs. Generally, in South Africa, the statements highlighted the diverse approaches adopted by retailing fashion designers, considering factors such as market positioning, competition, cost structures, and business structures as well as customer perceptions:

- “At first, I wanted to price my items based on who I think I'm similar with in the market. Because I knew that customers do that. Sometimes can't stray too far away...But then I also knew that I had to make a bit of profit. So then, I was like, okay, maybe the fabric combined is too expensive. I need to then broaden my supply chain, to get people that will be able to sell this stuff at a good price, but also not compromising on quality.”
- “It depends on your business model. I've got someone that works for me, and we do everything in-house; if you work with a CMT, you'll have a different price strategy.”

- “Because for me as well, efficiency is very, very important. So, just try and make it [pricing strategies] as efficient as you can, try and refine your life. It can't all be jumbled up...”

The interviews with fashion design entrepreneurs in Germany indicated that emerging fashion designers concentrated on the importance of calculating wholesale prices accurately, often benchmarking against industry standards and conducting thorough research to determine suitable markups. The aim was to maintain competitive retail prices, while ensuring sustainable margins, considering factors such as production costs, taxes, and market demand.

Established designers similarly focus on cost considerations, with some adopting a multiplier approach to determine both wholesale and retail prices. They prioritised consistency in pricing across distribution channels to maintain brand integrity and customer trust. On the one hand, the retailing fashion designers in Germany primarily utilised the keystone markup method, also known as the cost-plus strategy and competitive pricing, by benchmarking their prices against competitors to ensure market competitiveness. On the other hand, established retailing fashion designers in Germany appeared to employ a combination of strategies. Established fashion designers additionally seemed to utilise elements of the value-based pricing strategy, considering the perceived value of their products when setting prices. Finally, established designers demonstrated a more diversified approach to pricing, drawing on multiple strategies to optimise profitability and market positioning.

Overall, both emerging and established categories in South Africa and Germany recognised the complexity of pricing strategy development, balancing affordability with profitability and market competitiveness. The strategies of retailing fashion design entrepreneurs in Germany are highlighted in the following statements:

- “The businesses I'm benchmarking is around that, and what they offer is around that.”
- “I have all the costs from the material I buy, and then the costs of the time which is needed to sew and then everything else, for example, and then I take it with [multiply by] two, and that is my wholesale price. I suggest to them

[retailers] to take that price and multiply it by 2.8. So, when I have it in my own shop that is also the way I do my prices, so I first take it with two, and then I take it with to the 2.8, so that the price at my own shop and the distributor will be the same. Now it's important to have the same price everywhere."

5.4.2.4 External Support

Q10/11_N14: Attainable Support Information

Interestingly, with this particular node/code, the interviews with retailing fashion design entrepreneurs in both countries revealed similar multifaceted approaches to seeking external support. Retailing fashion designers in both countries primarily found out regarding external support through a combination of networking, proactive research (mainly online), and engagement with industry-related organisations.

Networking played a significant role, with most fashion designers in both countries mentioning affiliations with the Fashion Council as their primary sources of information. Retailing fashion designers in both countries sought out opportunities and information by engaging in developmental programmes offered by these councils and making connections with other designers through networks/communities, newsletters and events. In South Africa, the SA Fashion Week was also found to be one of the significant sources of support and information for retailing fashion designers in the earlier years.

In South Africa, only five of nine retailing fashion design entrepreneurs had something to say on attainable support information. Emerging fashion designers primarily relied on proactive methods such as making phone calls, doing internet research, and actively seeking opportunities for financing and prizes. In contrast, established designers placed a greater emphasis on networking and affiliation with industry organisations such as the Fashion Councils. They stayed informed through newsletters and conversations with peers, indicating a more interconnected approach to accessing external support. Notably, with their established reputation and industry standing, eminent designers had access to a broader network of connections and higher-level opportunities. They received direct invitations and opportunities, often facilitated through relationships with government agencies or industry councils. Compliance with industry standards and recognition for superior performance also

played a significant role in accessing external support, such as grants from the Industrial Development Corporation (IDC).

While all retailing fashion designers in South Africa utilised a mix of networking, proactive research, and engagement with industry organisations, the specific access to available opportunities varied based on their experience level and prominence within the fashion industry. The following statements highlight the South African findings related to attainable external support information:

- "Looking on the internet making phone calls, you know, trying to create opportunities..."
- "In newsletters, talking to other designers... Being affiliated with organisations like the (...) Fashion Council... It's just reading and being in touch."
- "A phone call came and said, hey, here's an opportunity. Are you interested you have to submit all this paperwork? (...) Fashion Week would have been directly from the DTI, and then I think Pure London was through the (..) Fashion Council."

In Germany, retailing fashion designers navigated a more diverse landscape of external support options. International partnerships and opportunities were also explored to expand reach and access external support, with designers leveraging online platforms, industry events, and cross-border collaborations. Financial support, including grants and loans (more so than in South Africa), was sought after and researched diligently, with technology and digital platforms emerging as essential avenues for funding, exposure, and market access.

Similar to South Africa, it appeared there was a difference in how emerging and established retailing fashion designers accessed information on attainable external support in Germany. As in South Africa, emerging fashion designers had to actively seek out opportunities in Germany. In contrast, established fashion designers in Germany (similar to South African established and eminent retailing fashion designers) had more established networks and partnerships within the industry, even paid partnerships. They also received information regarding attainable external support through existing relationships with government agencies, industry

associations, and other established players in the fashion ecosystem. Additionally, established fashion designers in Germany had access to specialised advisors or consultants, who could provide guidance on available support options and strategic growth opportunities. The following statements highlight the findings in Germany related to attainable external support information:

- “But things like funding, for example. We're part of the Fashion Council...”
- “And I take like a day or two to just search through the internet and see, what's up?”
- “From the government, there are always [information and funding] ... Yeah, you just really have to search for it. You can find it...”

Q12/13_N15: External Support Challenges

In Germany and South Africa, retailing fashion design entrepreneurs encountered similar challenges with external support. Bureaucratic obstacles were a common theme, with entrepreneurs facing difficulties navigating complex administrative processes that consumed valuable time and resources. Additionally, there was a shared frustration with the lack of responsiveness from support agencies, making it challenging for entrepreneurs to access the assistance they needed effectively. Furthermore, in both countries, there was a prevailing sentiment of disillusionment with past support efforts, as entrepreneurs felt, notwithstanding significant investments, there was a lack of tangible business outcomes.

There was a myriad of challenges encountered by retailing fashion design entrepreneurs in South Africa regarding external support. The retailing fashion designers in South Africa expressed frustrations with the lack of responsiveness from support agencies and difficulty accessing funding due to stringent criteria, including revenue thresholds. Moreover, there was a palpable sense of disconnect between eminent retailing fashion designers and grassroots fashion designers related to education at higher institutions, mainly highlighted by disparities between actual retailing requirements and educational curriculums.

These narratives collectively underscored the complex and multifaceted challenges facing fashion design entrepreneurs in navigating external support systems operated

by individuals without the perspective of retailing fashion designers' needs. The following sentiments highlight the challenges related to external support in South Africa:

- "Access to contact persons [was a challenge]... When you get incentives advertised, sometimes it's just paperwork, [and] sometimes the follow through is not very easy... That's always a frustration, and as well as red tape..."
- "And my understanding from the DTI is that they want to give everyone a turn. So, you go once, and then you don't go again [to international tradeshow]. So, in my mind, it's like, the funding is there, but I don't know if it's being used, like sustainably. I mean, stats on those trade shows are that unless you did [it] three times, the buyers won't engage."
- "I also got asked to sit on the board of the Fashion Council... That all fell apart because, you know why? Because the guys that had the most to say, were the guys that came out of the big chambers (chain stores). But they see things from their perspective; we see things from a different perspective."

In Germany, multiple interviewees expressed frustration with the struggle to find accessible information regarding support programmes. Similar to South Africa, high criticism was levelled at the inefficiency of the application process, with excessive paperwork and administrative requirements hindering entrepreneurs from accessing support effectively and making the process cumbersome and counterproductive, as those processes were time-consuming, often leading to the prioritisation of immediate business tasks over pursuing external support, due to time constraints.

Established retailing fashion designers, moreover, expressed frustration over the perceived lack of support compared to emerging designers, reflecting a perceived imbalance in the allocation of resources and opportunities by the fashion support structures. Additionally, Fashion Week was criticised for its emphasis on showcasing, without yielding tangible business outcomes. It was seen as more of a superficial showcase, rather than a platform that fostered meaningful connections and business opportunities. The following extracts from interviews in Germany address some challenges discussed:

- “It's really inefficient. They ask you millions of questions that could have been, like, a five-point phone call and, three meetings, and two emails. And everything is recorded because they are reporting back to the city. And it's super tedious and actually very counterproductive.”
- “I don't know where to find any information, especially for fashion.”
- “Everything is about Fashion Week (...) and then, at the end of the show, nothing happens. There's no new customers or something like that.”

Q14_N16: External Support Impact

First, both countries recognised the importance of formal programmes and mentorship initiatives in providing guidance on business processes and facilitating personal and professional development, particularly for emerging fashion designers. Additionally, access to resources such as financial assistance and machinery was deemed beneficial, particularly during challenging periods such as the COVID-19 pandemic. Moreover, networking opportunities facilitated through industry networks and collaborations played a significant role in enhancing visibility and accessing resources for fashion entrepreneurs in both nations.

The emerging fashion designers in South Africa emphasised how external support enhanced their understanding of the market and business acumen, allowing them to make informed decisions and navigate challenges effectively. Practical experience gained through exposure to design studios, factory floors, retail environments and eminent retailing fashion designers was also emphasised as valuable for continuous learning and skill development—furthermore, rental relief offered crucial support, particularly during times of crisis such as the COVID-19 pandemic.

Eminent retailing fashion designers touched on the impact of machinery supply. They described the support as beneficial, indicating the provision of machinery was seen as a valuable contribution to the designers' businesses, with a favourable effect on the designers' business performance. Last, eminent fashion designers shed light on the negative impacts of external support for international exposure that was previously implemented prematurely. They indicated the support created production demands of more extensive orders that fashion designers were not ready for, which led to fashion

designers facing difficulties in funding, sourcing materials, and ensuring their factories' capacity could be due to the increased production orders. This pressure on the supply chain subsequently led to quality issues, potential losses of orders and, ultimately, damage to South African fashion designers' reputations as a whole. The following statements highlight the findings on the impact of external support in South Africa:

- “It was definitely through this program that I got to really grow up and understand the requirements for the level of success that I was beginning to focus on. Even now, I still believe in mentorship; I've always believed in mentorship.”
- “But we put forward a whole lot of machines that we felt would both improve our quality and our speed because obviously, they want South African businesses to do well, they want more people to be employed. So that's why we engaged with that one [external support].”
- “Let's say that designer comes back; they get an order for, let's call it, the 1000s per style (....) are they gonna be able to make it? First of all, how are you gonna fund it? Where you gonna get your fabrics? You know, is your factory up to scratch to be able to do that production? Because maybe 50% is going to be kicked out, and you lose all that money. So have you thought about all those things... We'll create a bad name because we get orders, and then the guys don't deliver.”

The interviews from emerging retailing fashion design entrepreneurs in Germany indicated that endorsement from networks and social impact movements had proven to be influential in increasing visibility and recognition for designers, generating attention and momentum for their brands. Generally, organisations such as the Fashion Council played a pivotal role in connecting fashion designers with funding opportunities and resources, enabling them to secure essential financial support for business development.

Some support, such as financial assistance for startups, however, came with conditions requiring investment in specific areas such as marketing. While this support was beneficial, it also imposed constraints on how funds could be utilised, shaping the strategic direction of the businesses and, ultimately, not impacting their

critical success areas. The following statements highlight the impact of external support in Germany:

- “Fashion Council (...) they actually helped a lot... They send us all kinds of funding opportunities, they get (..) from the state directly. They're doing a bunch of work in the German fashion world... This has been a great way to get some fundings.”
- “In so many ways, I think first big thing is networking. Whoever's in position, whoever's in charge, whoever has the most influence gets to know my name and my business name. Second, is acquiring knowledge myself; therefore, I can hire and collaborate with people and really see through how competent they are. And third... funding.”
- “And if you are a startup and you are putting your business in Berlin, then you get like €50 000 for the startup company. But you have to invest the money into marketing. So, they don't want us to invest it in new people (...) and then we have to show it.”

Q16_N17: Financial Support Needs

Both countries emphasised the importance of financial support in managing the entire value chain of their businesses, which ultimately impacted the 6Ps of the retail mix. These areas included design, production, distribution, marketing and personnel.

The interviews with retailing fashion design entrepreneurs in South Africa expressed the need for financial support to facilitate different aspects of their businesses, ranging from equipment acquisition, to operational expenses and expansion efforts. Many fashion designers highlighted the significant capital required to invest in equipment such as embroidery machines, fabric printing machines, and technology, with costs reaching millions in some cases. Additionally, the need for funding extended to other areas such as shopfitting, salaries for staff, rental costs, and marketing expenses.

Established fashion designers emphasised the importance of financial support in setting up stores, covering merchandise costs, and hiring skilled personnel. Moreover, there was consensus among entrepreneurs regarding the critical importance of financial support in managing the entire value chain of their businesses, including

design, production, distribution, and marketing. Some fashion designers also expressed aspirations for property acquisition to establish dedicated spaces for their brands, indicating a need for substantial investment in real estate. In general, the retailing fashion design entrepreneurs in South Africa underscored the diverse and significant financial support needs, ranging from R30 000 for basic rail rentals with lower risks, to R5 million for equipment acquisition and adequate business space. The following statements highlight the lowest, middle values and highest amounts mentioned as financial support needs:

- “I think if a person could raise between like 30 and 50k. I think it's doable. But they have to slice and dice; that's on a shoestring budget. But then you are lowering your risk.”
- “I think the shop will probably be, shopfitting 200k (not sure), and staff would be 15,000 to 30,000 x 12, for salaries ... I'll open another shop for all the designers to share and I'll give staff for their businesses. That would be great.”
- “One store, at least 3-5 million. You know our staff is so important; you've got to get the right people.”

The financial support needs among retailing fashion design entrepreneurs in Germany highlighted that emerging fashion designers required substantial investment to initiate structural changes within their businesses, including equipment upgrades for tailors and educational programmes to enhance skills, while emphasising the challenges in accessing funding. Many fashion designers, particularly emerging ones, sought financial assistance through long-term repayable loans to provide stability and support.

Additionally, there was common recognition among fashion designers in Germany, both emerging and established, regarding the importance of investing in HR to support business growth, even though acknowledging the high costs associated with hiring in Germany. Strategic investment in production, research, and marketing was also deemed essential for enhancing brand visibility and driving sales. On the whole, the financial support needs were diverse, ranging from €8 000 for a collection to €500 000 for HR needs and marketing events. The following statements highlight the lowest, middle values and highest amounts mentioned as financial support needs:

- “It depends what exactly I would want to do, like, I can do a cool new design and collection and stuff like this for, like, €5 to €8 000. But to really initiate structural change... I don't even know how mad how expensive that would be?”
- “I would like €125 000, in the form of like a long-term paid, like, repay loan, not even as a grant, just as type of loan that is available for my sector? Because from my research, it is so hard to get it.”
- I think if I got like €500 000, I could step up the business in a completely different way(...) if I have like one salesperson who'll do all the sales work, and also organising like customer events and stuff. Then they would buy more, of course, and then the money comes back. So that will be an investment for one person. Also, of course, in Germany, one person costs a lot of money.”

Q15_N18: Implementation Recommendations

The findings from both Germany and South Africa, regarding implementation recommendations for external support, revealed several striking similarities. First, there was a unanimous call for greater collaboration and knowledge-sharing platforms within the industry in both countries. Retailing fashion entrepreneurs emphasised the importance of organising forums and events where designers could potentially come together to exchange ideas, learn from each other, and collectively propel the industry forward.

Second, there was shared recognition of the need for practical support, such as financial management guidance and access to funding. Mentorship programmes and guidance from experienced professionals were deemed essential for emerging designers in navigating the business aspects of the fashion industry in both contexts. Last, there are similar recommendations for government intervention, including research-driven support initiatives, sector-specific policies, and support for local manufacturing. Additionally, involving fashion designers in developing strategies and policies was highlighted as crucial for fostering sustainable growth within the industry.

The retailing fashion design entrepreneurs in South Africa revealed several key insights and suggestions to enhance external support initiatives within the industry.

There was a call in South Africa for more retail opportunities and fabric availability to support designers in selling their products and sourcing materials locally.

Suggestions for government intervention included research-driven support initiatives, separating the larger clothing/apparel sector needs from fashion designers' needs, sector-specific policies, and support for local manufacturing and incentivising government officials for successful industry initiatives. The following quotations highlight the recommendations from retailing fashion design entrepreneurs in South Africa:

- "Maybe have more forums with designers and people that are in this industry get together, share ideas, and try to move this industry in a more forward direction? I think a lot of us are just isolated to try to do our own thing, I think we could be so much better together."
- "So, we're not aware of where we can go knock. It would be nice to have a list of January, February, March, April. Like, where's what happening? When can we get involved in?"
- "Can you not appoint one personnel from the Department... sit down with each type of designer... hear what it is that they need? And to grow, and to build and to assist, to build the industry? (...) come up with a plan 5-10 years... Actually, build the brands... And then you'll see how much employment is going to come from that building."

The implementation recommendations from German fashion design entrepreneurs were very similar to those of South African fashion designers. There was clear consensus from retailing fashion designers in Germany on the necessity for a centralised platform that streamlined access to funding opportunities and support services, addressing the current fragmentation and lack of awareness among entrepreneurs. Furthermore, continuous financial support, particularly during the initial stages of business development, was highlighted as essential for sustaining growth and innovation. Additionally, challenges related to language barriers and bureaucratic complexities hindered entrepreneurs' ability to access available support, suggesting a need for more streamlined and accessible assistance mechanisms.

Moreover, there was recognition of the importance international expansion holds for long-term success, emphasising the need for support in establishing and nurturing international connections and partnerships with more fashion-focused countries. Last, there was a proposed shift in the industry dynamics, with a call for empowering designers to take the lead in forming partnerships with retailers, signalling a potential transformation in how collaborations were initiated and sustained. The following quotations highlight the recommendations from retailing fashion design entrepreneurs in Germany:

- “So, I think if you want to be a really successful designer, you have to sell internationally, not only in Germany, because it doesn't make any sense here. And the support needs to be then for internationalisation.”
- “I think it would work if you had the fashion designers in charge. And they would cooperate with retailers they choose... So, of course, for the fashion designer who would do this work, they could not focus so good on the label. But as long as they would be paid, (...) like a part-time thing for two years. Then another one comes in charge for two years. Everybody part-time. So, on a long, long term. You can still do your label, I think. And yeah, that would work.”
- “Still, it would be good to have a have a centred information website would be super.”

5.4.3 Summary of Qualitative Results

Through in-depth interviews with retailing fashion design entrepreneurs, the qualitative analysis uncovered the specific needs and challenges, for external support organisations to conceptualise strong frameworks and policy guidelines, considering critical factors to support the retailing fashion design entrepreneurs in Germany and South Africa.

To summarise the qualitative data analysis and findings, hierarchal charts were generated through Nvivo 12. The hierarchical chart served as a visual representation of the hierarchical relationships between nodes that represented codes and the themes drawn from the propositions of this qualitative section. Separate charts were generated for both South Africa and Germany, which provided the visualisation of the relationships between nodes representing propositions in each country, enabling a

deeper understanding and comparison of the hierarchical structure of the data. By organising nodes hierarchically, the relationships between nodes were analysed to identify the importance of the critical success factors in each country, according to patterns or trends in the data.

As illustrated in figure 21, the most prevalent propositions in South Africa, with the exact number of nodes aggregated, were *fashion products* and *fashion retail place*. With *fashion products*, the prevailing code was *production and manufacturing support need* (P8_N8), followed by *sustainability* (P10_N10) and *sourcing support needs* (P9_N9). However, it is important to note these themes were merged, as participants discussed them interchangeably. Nonetheless, the hierarchical chart offered insight into the most dominant proposition within the merged node, which was renamed *sustainable sourcing and manufacturing/production support needs*. The propositions that were the least dominant were *sales reports support needs* followed by *sales forecast information needs*, which were also merged and renamed *sales information support needs*. *Sales information needs* were the least dominant code, which merged *sales reports support needs* and *sales forecasting information needs*. Ultimately, in South Africa, sales reports were found to be slightly more esteemed than sales forecasting.

With *fashion retail place*, *trading and distribution support needs* (P3_N3) were the most important factors, followed by *business support needs* (P4_N4), then *omnichannel support needs* (P2_N2), closely followed by *retail location* (P5_N5). These findings were interesting, as they illustrated that participants considered integrated channels as their retail locations. Finally, *business partnerships* (P1_N1) was the least discussed proposition, highlighting the lack of shared responsibilities within retailing fashion designers' businesses in South Africa.

The next proposition of great importance to retailing fashion design entrepreneurs in South Africa was *external support*, with *external support challenges* (Q12/13_N15) discussed the most, followed by *implementation recommendations* (Q15_N18), then *financial support needs* (Q16_N17). These results indicated that participants in South Africa encountered significant challenges with external support and had recommendation ideas and specific financial needs to counteract most of those

challenges. Interestingly, *external support impact* (Q14_N16) and *attainable support information* (Q10/11_N14) were the least discussed propositions (in that order).

The least dominant proposition was then *fashion pricing*, which was not a surprise, as it also occurred as a potential reverse factor with consumers. Participants mainly discussed *pricing strategy* (P13_N13) and the *determination/goals of their current price points* (P11_N11), generating the exact frequency of codes. However, participants had minimal opinions on *pricing support needs* (P12_N12), which suggested the additional insights related to pricing support were crucial for retailing fashion design entrepreneurs in South Africa.

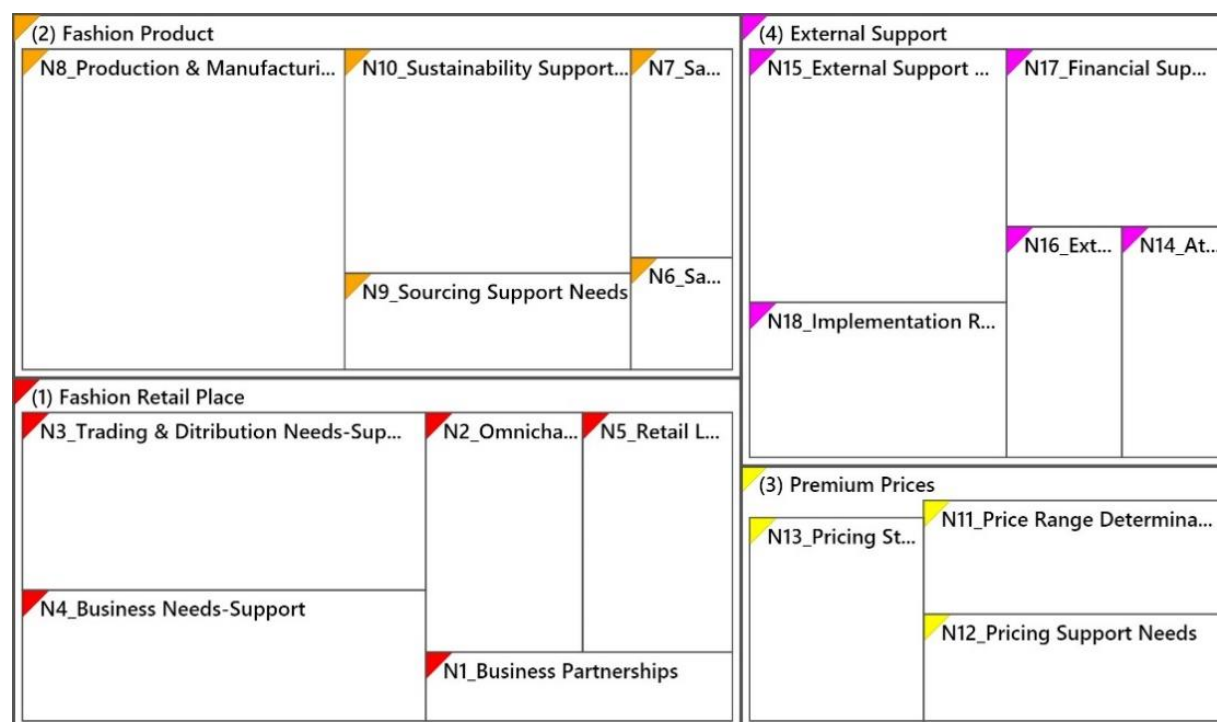


Figure 21: Hierarchy Chart for Findings in South Africa

Source: developed by Author

As illustrated in figure 22, the most prevalent factor in Germany, with the highest nodes aggregated, was *fashion retail place*. Similar to South Africa, *trading and distribution support needs* (P3_N3) was the most important factor. However, the difference with Germany was that *trading and distribution support needs* were followed by *retail location* (P5_N5) (instead of *business support needs*), which was discussed more than *omnichannel support needs* (P2_N2), indicating the importance of brick-and-mortar in

Germany over integrated channels for fashion design entrepreneurs. The other difference with South Africa was that *business partnerships* (P1_N1) were discussed more than *business support needs* (P4_N4) in Germany, which potentially meant that business partnerships impacted some business support needs, which were discussed the least.

Unlike South Africa, the second proposition of great importance to participants in Germany was *external support*, with *implementation recommendations* (Q15_N18) discussed the most, closely followed by *financial support needs* (Q16_N17) and *external support challenges* (Q12/13_N15). These results indicated participants in Germany had several ideas regarding recommendations for external support, which were in close proximity to *financial support needs*, more than *external support challenges*. Thus, it could be argued the recommendations for external support came from different dispositions depending on the country. As with South Africa, external support impact and attainable support information were the least discussed propositions, aggregating the exact number of codes (in that order), which could also be connected to these being themes that occurred under the code external support challenges.

The third proposition discussed at lesser frequency was *fashion pricing*. Similar to South Africa, participants mainly discussed *pricing strategy* (P13_N13) and the *determination/goals of their current price points* (P11_N11) and had minimal opinions related to *pricing support needs* (P12_N12). This again suggested additional insights related to pricing support were also crucial for retailing fashion design entrepreneurs in Germany.

Interestingly, *fashion products* was the least dominant factor, with the prevailing proposition being *sustainable support needs* (P10_N10) followed by *production & manufacturing support needs* (P8_N8), with almost no mention of *sourcing support needs* (P9_N9), which meant this particular proposition could not be proven for Germany. Furthermore, similar to South Africa, those nodes were merged, as they were discussed interchangeably by participants in Germany and renamed *sustainable production/manufacturing support needs* (without the sourcing). The propositions that were the least dominant were those related to *sales information support needs*, which

were *sales forecasting information needs* (P6_N6) and *sales report support needs* (P7_N7), with the latter mentioned by participants the least, which differed from South Africa.

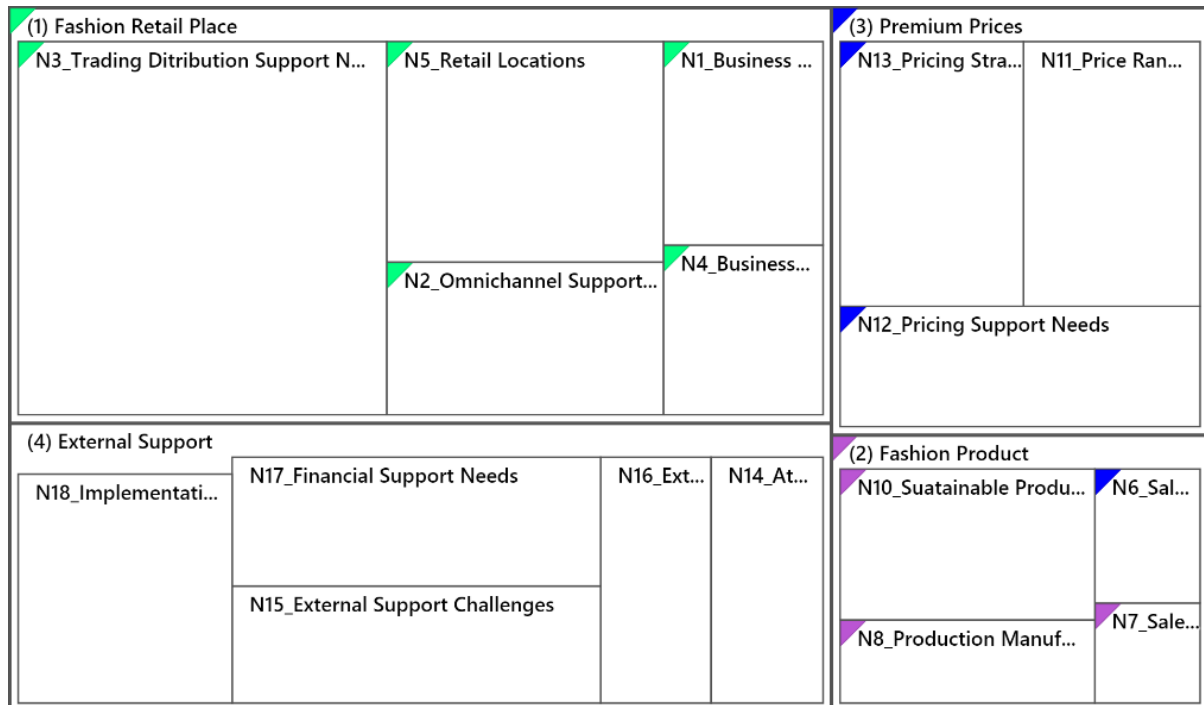


Figure 22: Hierarchy Chart for Findings in Germany

Source: Developed by Author

5.5 CHAPTER SUMMARY

This chapter offered a detailed analysis that thoroughly investigated the dynamics shaping the success trajectories of retailing fashion designers, including consumer preferences, entrepreneurial strategies, external support mechanisms, and regional dynamics. Basically, this chapter provided a comprehensive data-driven foundation for proposing external support policy-guidelines and a framework for external support. It integrated findings from quantitative analysis, qualitative research, and hypothesis verification, in order to comprehensively understand the factors influencing consumer patronage, to ensure the proposed policy-guidelines are well-informed, contextually relevant, and capable of addressing the specific needs of fashion design entrepreneurs in South Africa and Germany.

The quantitative analysis, conducted with 511 respondents in South Africa and 532 respondents in Germany, highlighted the critical importance of *fashion products* and

fashion retail place as success factors. Through descriptive statistics, the kano model, and regression analysis, hypotheses regarding omnichannel retailing, slow fashion products, premium pricing, promotional presentation and personal interaction were verified in both regions, with omnichannel retailing and slow fashion products identified as critical success factors. Additionally, the study identified price, particularly premium pricing, as a crucial factor that could potentially negatively impact consumer satisfaction, when not addressed by retailing fashion designers and external support mechanisms.

Qualitative research further enriched the analysis, initially with 29 propositions considered, encompassing all aspects of the retail mix. Following this, 13 propositions, focusing on critical success factors identified in the quantitative analysis, were discussed with retailing fashion designers, resulting in comprehensive insights from nine designers in South Africa and six in Germany. The findings underscored the importance of addressing critical success factors within fashion businesses and the role of external support.

Notably, the discussion of the 3Ps (place, product and price) as critical success factors led to insights touching on all 6Ps of the retail mix. Ultimately, the understanding of the interaction between consumer preferences, entrepreneurial strategies, and external support mechanisms in the success of retailing fashion designers in diverse regional contexts was enhanced through this chapter.

CHAPTER SIX: DISCUSSION OF FINDINGS

This chapter did not unfold in isolation; instead, it is linked to chapters 2, 3, 4 and 5, as it carefully navigates the implications of the findings, drawing connections to existing literature and theoretical frameworks. Through this synthesis, this chapter strived to shed light on the broader significance of the results within the literature, in connection to the research questions and objectives. By providing a comprehensive interpretation and synthesis of the empirical data, this chapter will eventually link the findings to existing literature and offer a framework to guide external organisations' policies to best support fashion design entrepreneurs to meet market needs in retail.

The initial steps addressed the first research objective related to consumer needs from retailing fashion designers for sustained patronage, addressed through the kano model. Exploring the second research question, concerning the critical success factors of retailing fashion design entrepreneurs, a synthesis of findings underscored the significance of two retail mix factors, which were place, related explicitly to omnichannel retailing and slow fashion products. Moving to the third research question, which classified external support for retailing fashion design entrepreneurs in Germany vis-à-vis South Africa, a comparison emerged. Finally, the fourth research question scrutinised the differential needs of retailing fashion designers from external support in Germany, compared to South Africa, in order to realise their critical success factors. Figure 23 visually represents the context of this chapter.

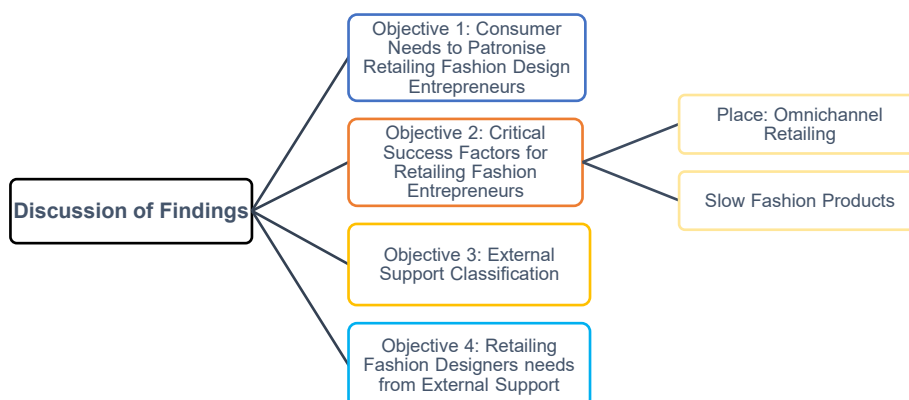


Figure 23: Chapter 6 Outline

Source: Developed by Author

6.1 OBJECTIVE 1: CONSUMER NEEDS TO PATRONISE RETAILING FASHION DESIGN ENTREPRENEURS

The primary data analysis process used to evaluate consumer needs from retailing fashion design entrepreneurs was the kano model, which quantified satisfaction, dissatisfaction and performance by visualising consumer information (Ward and Lasen 2009: 9, 10). The results yielded similar outcomes to the study by Ek and Çıkış (2013: 412), where the higher number of combinations corresponded to the 'indifferent' kano attribute, which subsequently caused a limited perspective in interpreting the results. In that study, the issue was, however, remedied by introducing polarised categories to the 'indifferent' attribute.

In this study, however, the Matzler *et al.* (1996: 5) approach was implemented by classifying 'must-be', 'one-dimensional' and 'attractive' attributes as one focus, which resulted in ranking customer needs from retailing fashion design entrepreneurs as (1) place, (2) product, (3) promotion, (4) presentation and (5) personnel. These results were in line with the findings that indicated there was a relationship between the retail mix, consumer needs satisfaction and customer loyalty patronage, and by offering the correct retail mix combination and then offering the right mix [ranking] with superior attributes, those needs could be fulfilled (Chowdhury 2015: 109 & 131; Terblanche 2017: 1-10).

In the end, five of the six retail mix factors were categorised as 'indifferent' followed by the 'attractive' attribute. This alignment could be attributed to the fact that both 'indifferent' and 'attractive' attributes were considered latent. The 'indifferent' attribute implied that the factors had minimal impact customer satisfaction or dissatisfaction, while the 'attractive' attribute suggested the factors had the potential to satisfy and impress customers, particularly those previously unaware of these factors, as they generated some level of enthusiasm (Matzler *et al.* 1996; Mikulić and Prebežac 2011; Paraschivescu and Cotirlet 2012; Ek and Çıkış 2013; Shahin *et al.* 2013; Madzík 2016; Atlason *et al.* 2018; de Vasconcelos *et al.* 2022).

These findings were deemed justifiable for this study, as fashion design entrepreneurs' retail mix factors could be unfamiliar or 'indifferent' to most consumers, nonetheless,

'attractive' to consumers who were previously unaware of the retail mix factors connected to retailing fashion design entrepreneurs. With these outcomes, it could additionally be argued that as far as retailing fashion design entrepreneurs are concerned, consumers move from being 'indifferent' to 'attracted' to five of six retail mix factors, similar to how the Apple brand used to advance the 'attractive' attributes with customers; offering what consumers did not know they wanted or needed (Madzík 2016: 390).

The major difference was with the retail mix factor 'price', first categorised as 'indifferent' and second, exhibiting a 'reverse' attribute, suggesting not paying price premiums for fashion could increase customer approval (Borgianni & Rotini 2013; Liu *et al.* 2018). These results proved that research related to pricing was imperative for retailers to understand "how customers perceived price, what customers consider as good value, how much customers are willing to pay for specific products, what customers will pay more for and how much competitors are charging" (Savage 2015: 25).

It was, therefore, apparent that retailing fashion design entrepreneurs needed to create superior consumer value, as suggested by Jung and Jin (2016b: 6), through various pricing factors, to acquire a more competitive position in the market with consumers more concerned with slow fashion, resulting in those consumers perceiving higher value towards fashion products. Thus, it could be said that consumers in this study were not inclined to pay premium prices as they did not perceive that retailing fashion brands upheld sustainable values, which were proven to be aligned with higher pricing with enhanced brand responsibility (Kekkonen 2023: 2). In other words, retailing fashion design entrepreneurs in Germany and South Africa needed to succeed in creating that superior customer value to move from that 'reverse' attribute to a more 'attractive' attribute, with consumers more concerned with slow fashion (Leslie *et al.* 2014: 236; Jung and Jin 2016a: 1). Ultimately, it is imperative for retailing fashion design entrepreneurs to price their products appropriately, not too low, but rather striking the correct balance between the variety of price points, implementing the proper pricing strategy/ies, and communicating, as well as presenting the prices appropriately to consumers, to avoid some common pricing mistakes identified (Tsolova 2019). By striking the balance between different premium

price points, it could be argued that consumer heterogeneity on their willingness to pay for product quality and transactional costs (Shi, Liu and Petruzzi 2013: 1163), could be addressed.

The findings of this first objective indicated while retail mix elements did not exert a significant influence on overall customer satisfaction when purchasing from retailing fashion designers, they remained a crucial consideration for being more than 'must-be' or 'one-dimensional' attributes, but rather 'attractive' attributes that could surprise customers by offering them what they did not know they wanted. However, with 'price,' a different approach to creating customer value would be required.

Overall, the kano model provided valuable insights into which retail mix factors consumers perceived as potentially satisfying or dissatisfying. By understanding these dynamics, retailing fashion design entrepreneurs should tailor their strategies to move consumers from being mainly 'indifferent' about their retail mix to being attracted to their offerings to meet consumer needs effectively, ultimately enhancing customer satisfaction and loyalty. In connection to the fifth objective, by understanding and addressing consumer needs, the proposed external support framework (outlined in section 6.3 and 6.4) should be tailored to assist fashion design entrepreneurs in retail meet these needs, thereby sustaining critical success factors with consumers.

Figure 24 represents the current positioning of customer satisfaction (in the middle as indifferent) towards retailing fashion design entrepreneurs and the direction it moves towards with the arrows. In detail, Figure 24 illustrates the transitional nature of consumer perceptions by mapping retail mix attributes with satisfaction-performance movements. The central placement of most attributes within the 'indifferent' zone reflects their current neutral impact, while the directional arrows suggest latent potential for these attributes to evolve into sources of delight. This visual trajectory aligns with the Kano model's 'attractive' category, where unexpected features, once recognised, can significantly elevate satisfaction. Notably, the figure isolates 'price' within the 'reverse' zone, indicating a counterintuitive relationship: higher prices may diminish satisfaction unless justified by perceived value. This positioning underscores the need for strategic pricing that resonates with consumers' expectations around sustainability and ethical production.

By visually capturing these shifts, Figure 24 serves as a strategic lens through which fashion design entrepreneurs can assess and recalibrate their retail mix, moving from functional adequacy to emotional resonance.

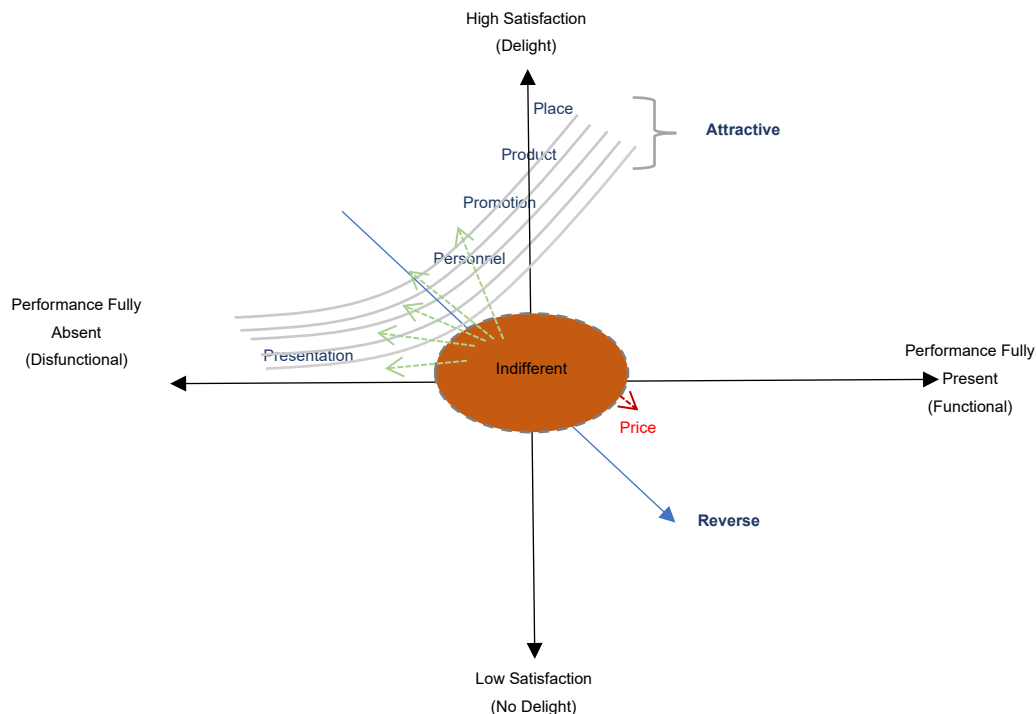


Figure 24: Retail Mix Kano Movements

Source: Adapted from Ullah and Tamaki (2011: 156)

6.2 OBJECTIVE 2: CRITICAL SUCCESS FACTORS FOR RETAILING FASHION DESIGN ENTREPRENEURS

The second objective investigated the empirical findings concerning critical success factors for retailing fashion design entrepreneurs. Critical success factors were considered the retail mix factors above average to the mean value of the overall retail mix factors in each country. That provided valuable insights into the elements that significantly influenced consumer preferences, aligning with the definition of critical success factors as key factors, where businesses needed to ensure accuracy to flourish (Rockart 1979: 85). The findings for this section are in agreement with Kim and Sullivan (2019: 2), in recommending by focusing on customer-centric metrics that appeal to emotions, fashion design entrepreneurs can ensure their products and services resonate with their target audience and drive repeat sales. Subsequently, those key or above-average retail mix factors were found to be retail place, specifically

omnichannel preferences and varying slow fashion product attributes, depending on the country.

6.2.1 Place: Omnichannel Preferences

Regarding place associated with omnichannel preferences, consumers in South Africa and Germany would be segmented under omnichannel enthusiasts, as they enjoyed the benefits of omnichannel shopping (Mosquera *et al.* 2019: 699). In Germany and South Africa, *information searching options* emerged as a significant factor influencing consumers' preferences for omnichannel retailing. This finding resonates with the literature, which emphasised the pivotal role of technology in facilitating seamless omnichannel experiences (Ryu 2019: 16; Business of Fashion and McKinsey 2022: 7). Consumers' preference for searching for relevant information using their mobile phones while shopping for fashion, underscored the importance of digital platforms in providing comprehensive and accessible product information across channels (Ryu 2019: 15).

The study additionally identified *omnichannel patronage intention* and the *offer of online shopping alternatives* as key drivers of consumers' preferences for omnichannel retailing. This finding aligned with the literature's emphasis on the concept of "phygital" retailing, which integrated physical and digital elements/online and offline channels to create unique shopping experiences (Banik 2021: 102739). Furthermore, this study highlighted the influence of regional differences on omnichannel preferences. While both South African and German consumers prioritised the offer of online shopping alternatives, South African consumers demonstrated a higher intention to patronise retailers offering both online and in-store services. This regional variation underscored the importance of tailoring omnichannel strategies to specific market contexts (Business of Fashion and McKinsey, 2022: 7; Ryu 2019: 16).

The empirical findings generally supported the concepts discussed in the literature review, emphasising the significance of technology, seamless integration across channels, and regional variations in shaping consumers' preferences for omnichannel retailing. Nonetheless, some gaps were still identified between the literature and the findings. While the literature discussed the importance of omnichannel strategies in

enhancing customer satisfaction and loyalty (Lee and Lee 2020; Verhoef *et al.* 2015), the empirical findings provided insights into specific factors that influenced consumers' preferences for omnichannel retailing, such as information searching options and omnichannel patronage intention. Another gap was the limited discussion in the literature regarding the differential impact of various omnichannel factors across different geographical regions. The empirical findings highlight differences in the influence of factors the offer of online shopping alternatives between South Africa and Germany, indicating the importance of considering regional variations in omnichannel preferences.

While the literature acknowledged the significance of omnichannel convenience and usefulness (Verhoef *et al.* 2015), the empirical findings suggested that factors such as *information searching options*, may strongly influence consumers' preferences for omnichannel retailing. This indicated a need to further explore the relative importance of different omnichannel factors in driving consumer behaviour. Ultimately, the empirical findings contributed valuable insights into the drivers of omnichannel preferences, offering a more detailed understanding than what is often discussed in the literature.

6.2.2 Slow Fashion Product

In the empirical findings, *product functionality* emerged as a critical success factor in both South Africa and Germany, while *authentic localism* and *product equity* were both critical success factors only in Germany and potential success factors in South Africa, as they resulted in an average mean value, instead on an above average mean value as in Germany.

6.2.2.1 Product Functionality

In the empirical findings, *product functionality* emerged as a critical success factor in both South Africa and Germany, with the highest factor ranking and contributing significantly to customer satisfaction. The findings regarding product functionality corroborated and extended the insights provided in the literature review, shedding light on the specific factors that influenced consumers' perceptions in South Africa and Germany. The empirical results highlighted the critical role of two independent

variables, namely *preference for clothing longevity* and *preference for classical & simplicity in fashion*, in shaping *product functionality*. These findings aligned with the literature's emphasis on functionality as a key determinant of consumer preferences, particularly in relation to fashion products (Blas Riesgo *et al.* 2022: 5; Jung and Jin 2016a: 412). Furthermore, retailers such as Uniqlo had successfully capitalised on this understanding by prioritising functionality over fleeting fashion trends, attributing their success to the functional attributes of their products (Tokatli 2020: 613).

The empirical findings also revealed that *preference for classical & simplicity in fashion* emerged as the most influential factor in shaping product functionality, closely followed by *preference for clothing longevity*. This underscored the importance of timeless and minimalist designs in enhancing the perceived functionality of fashion products, aligning with the literature's discussion on consumers' orientation towards longevity and versatility in fashion items (Blas Riesgo *et al.* 2022: 5; Jung and Jin 2016a: 412). The emphasis on classical and simple designs reflected a broader trend in consumer preferences, where durability and adaptability were valued over fleeting fashion fads.

The regional variations observed in the empirical findings, with South African consumers exhibiting a higher preference for classical and simplicity in fashion compared to their German counterparts, again resonated with the literature's discussion on geographical differences in consumer perceptions (Şener *et al.* 2019: 1555). While functionality remained a critical factor in both regions, the specific attributes contributing to product functionality may vary based on regional preferences and cultural influences.

Once more, a gap was found related to the lack of exploration in the literature, regarding how consumer preferences for functionality may vary across different regions or cultural contexts. The empirical findings highlight the significance of factors such as classical design preference, which may reflect specific cultural or market preferences not extensively addressed in the literature. Additionally, while the literature broadly discussed functionality in the context of sustainable and ethical fashion practices (Zamani *et al.* 2017; Pookulangara and Shephard 2013), the empirical findings provided more granular insights into how these principles manifested in consumer behaviour and perceptions. For example, the emphasis on clothing

longevity as a determinant of functionality, aligned with sustainability goals but may not be explicitly addressed in all discussions of functionality within the literature.

The empirical findings, overall, contributed valuable insights into the intersection of functionality, consumer preferences, and market dynamics, complementing and expanding on the foundational principles outlined in the literature.

6.2.2.2 Authentic Localism

The findings concerning *authenticity localism* provided an empirical validation for key concepts discussed in the literature, shedding light on this critical success factor. Authenticity, a fundamental attribute in consumer decision-making, encompassed elements such as brand identity, sincerity, and self-expression, all contributing to consumer perceptions of fashion products (Kim and Sullivan 2019: 5; Das *et al.* 2022: 12). The empirical findings confirmed the importance of authenticity as a critical success factor, particularly in Germany, where it ranked above average and highest among the dependent variables influencing consumer satisfaction, making the variable a critical success factor. These findings add to the notion that authenticity has had a significant influence on purchases of sustainable clothing (Hasan *et al.* 2022: 13). In South Africa, *authentic localism* ranked as average, considered a success factor but not necessarily critical. However, it is essential to note that though *authentic localism* was not a critical factor in South Africa, it still had a significantly higher mean value than Germany.

The EFA results, moreover, revealed that authenticity was closely linked to product locality, with consumers demonstrating a preference for 'locally-made fashion products over overseas-manufactured ones'. This preference reflected a broader trend towards sustainability and community-based economic decisions within the fashion industry, as consumers increasingly prioritised products aligned with their values and beliefs (Fletcher and Grimstad Klepp 2018: 134). The emphasis on the value of locally produced materials in South Africa further underscored the importance of utilising regional resources and fostering a sense of cultural identity in fashion production (Real *et al.* 2018: 17).

The findings, however, also highlighted a slight discrepancy between consumer support for local fashion and the perceived value placed on it. While consumers expressed a preference for locally-made products, there appeared to be a gap in actively supporting local fashion initiatives. This finding resonated with scholarly discussions on the challenges of translating consumer attitudes into behaviours, particularly in the context of sustainable consumption (Hasan *et al.* 2022: 13). It underscored the need for strategies to bridge the gap between consumer attitudes and behaviours towards local fashion, potentially through marketing campaigns or initiatives highlighting the economic and cultural significance of supporting local industries.

Yet again, the differences observed between South Africa and Germany regarding the factors influencing *authentic localism* underscored the importance of considering regional variations in consumer preferences. While both countries demonstrated a preference for locally-made fashion, the specific attributes that contribute to authenticity and locality may differ based on cultural norms and economic contexts (DeLong *et al.* 2013). For instance, South African consumers placed a higher value on locally-produced materials, while German consumers prioritised the overall value of locally-made fashion over overseas alternatives.

Upon comparing the discussion related to *authentic localism*, as discussed in the literature, with the findings of this research, several potential gaps or discrepancies emerged. Previous research had primarily focused on the authenticity of organic materials, overlooking consumers' broader authenticity preferences in designer fashion products (Hasan *et al.* 2022). Second, the findings indicated a discrepancy between the perceived value of locally produced fashion and the actual support for local fashion initiatives. Even though consumers demonstrated a preference for locally made fashion products, there seemed to be a gap in translating this preference into tangible support for local fashion initiatives (Das *et al.* 2022). This suggested a potential gap in understanding the mechanisms that influenced consumer behaviour and support for local fashion, which may not be fully captured in the existing literature. Last, while the literature emphasised the importance of localism in shaping consumer attitudes and preferences, differences in the impact of certain independent variables, such as preferences for handcraft over mass production, between different geographic

contexts, suggested localism may manifest differently across regions (Fletcher and Grimstad Klepp 2018).

6.2.2.3 Product Equity

As with *authentic localism*, *product equity* was found to be a critical success factor in Germany, with an above-average mean value, while in South Africa, it resulted in an average mean value. Saicheua *et al.* (2011: 2) underscored the significance of addressing unfair labour practices and deflation of prices in the fashion industry, which aligned with the broader concept of social equity. This notion was further emphasised by Bhardwaj (2020: 262), who discussed how social equity in fashion related to businesses' involvement with local communities and adherence to fair labour standards, correlating the findings in Germany that identified product equity as a critical success factor.

Peters and Simaens (2020: 26) highlighted the necessity of increasing consumer awareness regarding social and environmental issues in the fashion industry, in order to drive demand for sustainable products. Similarly, Eberhardt *et al.* (2021: 56) discussed how fairness within the fashion industry was often associated with fair trade practices and product certification systems, which provided consumers with assurance regarding the ethical sourcing and production of fashion items. The literature aligned with the study findings, where the notice of fair trade or ethical labels emerged as a significant factor influencing product equity and was deemed highly important by consumers, contributing to their perception of product equity. Consumers in this study further indicated a preference for transparent and ethically sourced fashion products, reflecting the importance of ethical practice transparency. However, there was a discrepancy found in the support for retailing fashion design entrepreneurs, as policies in Germany often made it challenging and expensive to attain sustainable product certification.

In general, the study findings aligned closely with the literature, emphasising the importance of equity as a product attribute in slow fashion and highlighting consumer preferences for transparent and ethically sourced products. However, several gaps became apparent upon scrutinising the discourse surrounding *product equity* in the

literature and comparing it with the outcomes of the empirical research. The literature acknowledged equity as a pivotal attribute for slow fashion, encompassing concerns regarding fair labour practices and social responsibility (Saicheua *et al.* 2011: 2). However, the findings investigated consumer perceptions of equity concerning fashion products more specifically. While the literature underscored the importance of increasing consumer awareness of social and environmental issues to spur demand for sustainable products (Peters and Simaens 2020: 26), the findings, furthermore, offered empirical evidence of the factors significantly shaping consumer perceptions of product equity. Notably, factors such as *concern for producers' working conditions*, *notice of fairtrade or ethical labels*, and the *importance of fair compensation* emerged as pivotal influencers, shedding light on the specific aspects of equity that resonate most with consumers when making fashion purchases, which retailing fashion design entrepreneurs could potentially focus on in their promotional or communication efforts with consumers.

Similar to other factors, the findings revealed significant regional differences in consumer concerns regarding product equity between South Africa and Germany. South African consumers exhibit a heightened concern for producers' working conditions, while German consumers expressed a slightly higher concern for fair compensation.

6.2.2.4 Critical Shopping Preferences for Retailing Fashion Design Entrepreneurs

Considering the findings of the second objective, the shopping preference theory was found appropriate to illustrate the critical success factors of the retail mix for retailing fashion design entrepreneurs. The shopping preference theory was used to integrate the shopping predisposition, choice calculus, shopping motives and shopping options of consumers (Sheth 1981: 4), and in the context of this study, of the critical success factors identified in the findings.

In view of the shopping preference figure, focused only on the critical success factor findings, it became clear the critical success factors in Germany and South Africa were the 2Ps from the retail mix: place (omnichannel preference) and product (slow

fashion). Germany indicated an above-average preference towards sustainable fashion products, otherwise known as slow fashion, with more slow fashion attributes identified as critical success factors than South Africa. However, South Africa was more interested in fashion products when comparing the mean values.

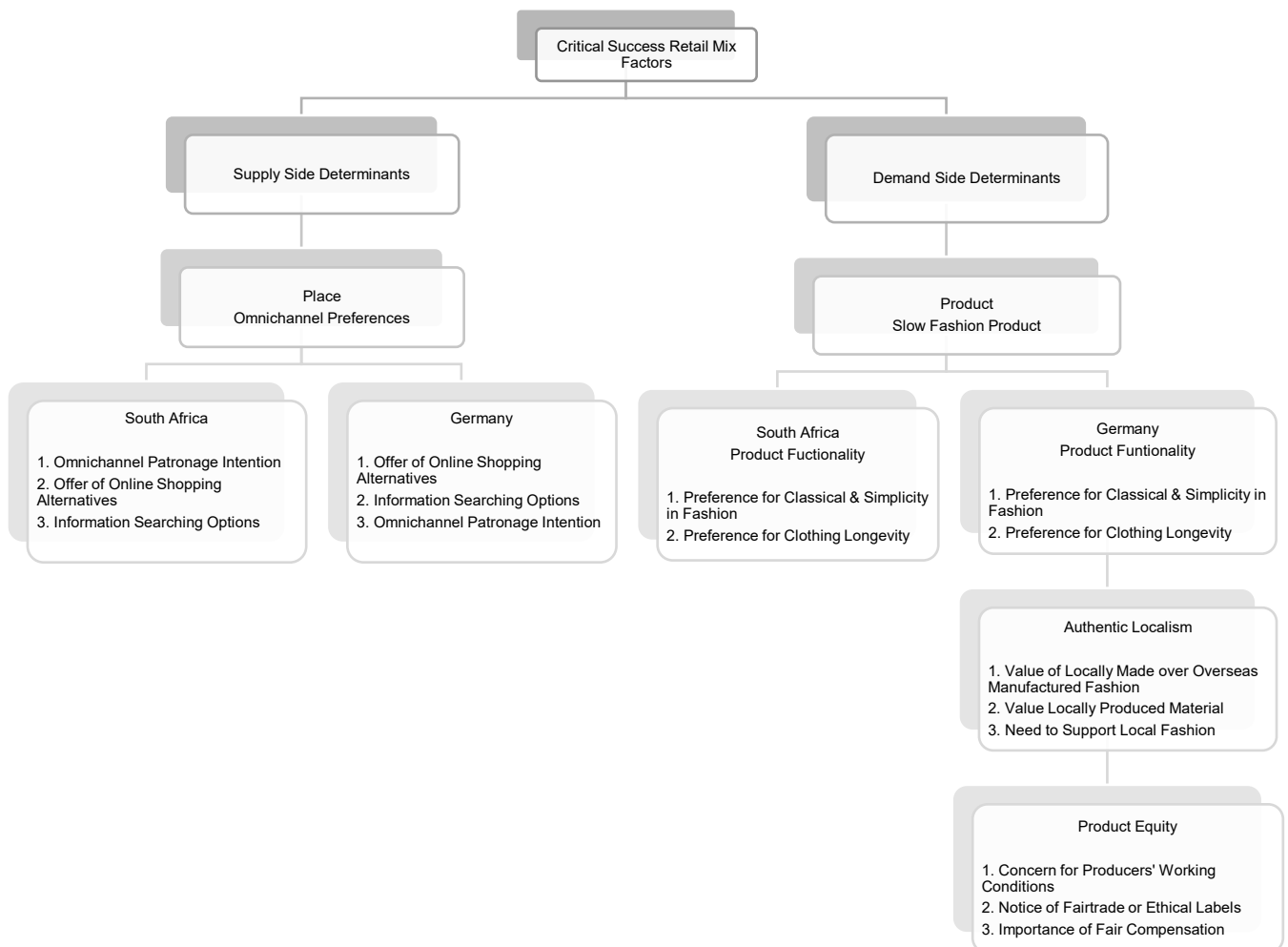


Figure 25: Critical Shopping Preference Theory Model/Framework

Source: Adapted from Sheth (1981: 15)

This framework, guided by the shopping preference theory, evaluates all critical success factors discussed in this objective. This particular framework was intended to inform the development of policy guidelines that focus on enhancing specific factors through targeted external support, ensuring that retailing fashion design entrepreneurs access the resources and capabilities needed to succeed.

6.3 OBJECTIVE 3: EXTERNAL SUPPORT CLASSIFICATION

With this third objective, the type of external support required in South Africa compared to Germany was classified in terms of ranking. Firstly, the hierarchical chart findings illustrated in figures 21 & 22 in chapter 5 were discussed in conjunction with the type of external support already available in South Africa and Germany, as summarised in table 3.2 in chapter 3. Thereafter, the findings of the hierarchical charts were scrutinised and ranked according to their order of importance, based on discussions with retailing fashion design entrepreneurs.

Regarding the general retail mix, in South Africa, *fashion products* and *fashion retail place* aggregated the most and the exact same number of codes, indicating they were found equally important in discussions with retailing fashion design entrepreneurs. *price premiums*, however, was the least mentioned in South Africa. Conversely, in Germany, in terms of the retail mix, *fashion retail place* was mentioned the most, followed by *price premiums* and *fashion products* mentioned the least.

These results did not align with the current external support available to meet retailing fashion design entrepreneurs' requirements in South Africa and Germany to fulfil the critical success factors. For instance, in South Africa, marketing support represented 23 percent external support and was the most predominant support in the reports (DSAC 2018; Cape Town Fashion Council n.d; ECFDC n.d; SAMW n.d; DFF n.d; SA Fashion Week 2021: 3, 9 & 10; AFI n.d). However, what seemed to closely align with the findings in South Africa was that trading support, the second most offered external support, together with training/educational support, represented 20 percent external support reviewed (The dtic 2022: 3; Cape Town Fashion Council n.d; ECFDC n.d; DFF n.d; SA Fashion Week 2021: 3, 9 & 10; AFI n.d). Thus, the external support in South Africa needs to refocus its resources to first meet the product supply needs of retailing fashion design entrepreneurs, then the retail place needs, with additional support and focus on pricing support and finally, consider increasing their financial support focused on these areas.

In Germany, however, the support was more evenly distributed, with financing being the predominant form of support, representing roughly 15 percent of the support offered (Textil+Mode 2019; Federal Government n.d; Federal Ministry for Economic

Affairs and Energy 2021: 1; Frankfurt Fashion Week 2022), then business support (European Fashion Group n.d; Fashion Council Germany n.d; Federal Government n.d), marketing support (Berlin Fashion Week n.d; Project Zukunft n.d; Frankfurt Fashion Week 2022), networking/ collaboration support (BTE n.d; Fashion Council Germany n.d; Berlin Fashion Week n.d), technological support, trading support (European Fashion Group n.d; Textil+Mode 2019; Berlin Fashion Week n.d) and training/educational support (BTE n.d; Fashion Council Germany n.d; Berlin Fashion Week n.d) were equally identified in literature, representing 11 percent external support. Even though Germany focused on supporting different aspects of retailing fashion design entrepreneurs evenly, findings indicated that fashion design entrepreneurs did not have equal requirements for support for their retail businesses and critical success factors did not require equal support as other factors. Instead, retailing fashion design entrepreneurs in Germany required support with international retail place first, then support related to pricing and finally with fashion products.

When zooming into the hierarchical chart and evaluating each variable discussed under the retail mix factors, each variable had a specific frequency of mentions from the interviews with retailing fashion design entrepreneurs, indicating the level of interest and time spent under each topic. Table 6.1 classifies the ranking of external support mentions comparing South Africa with Germany, based on the hierarchical chart, while providing the context of the current external support identified through institutional websites and reports.

As ranked in table 6.1, in South Africa, the external support discussed the most with retailing fashion design entrepreneurs was production and manufacturing support, followed by trading and distribution support. While numerous external institutions were identified as focused on trading and distribution support (The dtic 2022: 3; Cape Town Fashion Council n.d; ECFDC n.d; DFF n.d; SA Fashion Week 2021: 3, 9 & 10; AFI n.d). However, production and manufacturing support (which is the most predominant requirement) was significantly lacking in South Africa, with only two institutions identified as focused on this area (DSBD 2021: 28-30; The dtic 2022: 3).

Interestingly enough, omnichannel support, which ranked fifth, had no mention in terms of support from any institution, which signifies a crucial gap in South Africa. What

was mentioned the least in South Africa, in terms of critical support requirements, were business partnership support and sales information support, with sales information support not explicitly mentioned by any of the support entities, and business partnership support only identified once as a focus for the CTFC (CTFC Digital n.d.). These findings indicated there needed to be more consideration from both external support and retailing fashion design entrepreneurs, in terms of sales information and business partnership support, supporting slow fashion products in omnichannel retailing (as critical success factors) in South Africa.

German fashion design entrepreneurs were consistent with the need for retail place support, with the support of trading and distribution ranking first, followed by retail location support. Therefore, both Germany and South Africa recognised trading and distribution support as the most critical support requirement for their businesses (with a slight difference in ranking, Germany ranking it first and South Africa second). On the one hand, the results signified that retailing fashion design entrepreneurs acknowledged *retail place* as a complicated but necessary system, which ensured products were accessible to the consumers (Išoraitė 2016: 32). On the other hand, Germany's major difference from South Africa was the recognition of pricing support needs, ranking third and fourth in Germany and fifth and sixth in South Africa. These results showed German retailing fashion design entrepreneurs understood more than South African retailing fashion design entrepreneurs that businesses needed to understand pricing objectives associated with pricing strategies for their success (Faith and Agwu 2018: 89). Additionally, retailing fashion design entrepreneurs in Germany made no mention of sourcing support, unlike in South Africa, where it ranked seventh, which was in line with the literature that identified problems with sourcing as one of the barriers to retailing fashion designers' success (Fernandes 2019: 7-8).

Generally, no entities in Germany and South Africa explicitly mentioned pricing and sales information support. South African support entities also did not mention sourcing support, which was one of the critical factors in the country. Moreover, the number one critical factor in both countries had minimal to average consideration from external support. This indicated there could be a noteworthy gap between the critical success factors and the current external support available.

Table 6.1: External Support Requirements - South Africa Compared to Germany

Findings Ranking	South Africa	No. of Current Support	Germany	No. Current Support
1	Production and Manufacturing Support	+/-1	Trading and Distribution Support	+/- 3
2	Trading and Distribution Support	+/-6	Retail Location Support	+/- 3
3	Sustainability Support	+/-1	Pricing Support	Unclear
4	Business Support	+/-4	Determining Price Ranges	Unclear
5	Omnichannel Support Retail Location Support Determining Price Ranges	0 +/- 6 Unclear	Omnichannel Support Sustainability Support	+/- 3 +/- 2
6	Pricing Support	Unclear	Business Partnership Support	+/- 3
7	Sourcing Support	Unclear	Business Support	+/- 3
9	Business Partnership Support	+/-1	Production and Manufacturing Support	+/- 2
10	Sales Information Support (with preference for sales reports)	Unclear	Sales Information Support (with preference on sales forecasting)	Unclear

It is important to note the ranking in table 6.1 is based on critical success factors only, meaning all the support structures mentioned are crucial to the success of retailing fashion design entrepreneurs, and they only differ in the order of importance and mentions from retailing fashion design entrepreneurs. In other words, by classifying and evaluating external support mechanisms, this objective provided a basis for proposing specific policy-guidelines that leveraged the most effective types of support tailored to the unique needs of retailing fashion design entrepreneurs in South Africa and Germany.

6.4 OBJECTIVE 4: RETAILING FASHION DESIGNERS NEEDS FROM EXTERNAL SUPPORT

This section on external support examines the strategies, challenges, impacts, and recommendations related to accessing support for retailing fashion design entrepreneurs in both South Africa and Germany in more detail. Understanding the specific needs of retailing fashion designers allows for formulating targeted policy guidelines that address those needs, ensuring external support is relevant and impactful. The findings of this study support the definition by Virani and Banks (2014: 2) that external support is essential for entrepreneurs' business growth and

development. This observation further supports Grundey and Daugėlaitė (2009: 118), who argue that industrial partnerships enhance access to external expertise and support, thus fostering market competitiveness.

It is important to note that, even with the significance of external support, disparities existed in the experiences of emerging, established and eminent fashion designers in both countries, which indicated that while external support was available, its accessibility varied depending on one's position within the industry. This necessitated the need for relationship marketing, with the understanding of exchange behaviour and relationship development between organisations, and the knowledge of how the nets of relationships evolved (Möller and Aino 2000: 39).

6.4.1 Attainable Support Information

In terms of *attainable support information*, it appeared the emerging fashion design entrepreneurs in both countries understood the advantages of online resources, as they actively engaged in proactive research methods such as internet searches and making direct inquiries. This proactive approach was recognised as critical, because businesses that possessed comprehensive knowledge of their industry's regulatory, competitive, and technological environments, were found to perform better, illustrating that industry knowledge and operational competencies were crucial for the success of SMMEs (Kozielski 2019: 322).

Retailing fashion design entrepreneurs in Germany and South Africa, in addition, extensively relied on networking, proactive research, and engagement with industry organisations to access external support. Both regions heavily emphasised networking and affiliations with Fashion Councils, although the platforms and effectiveness of these approaches exhibit notable differences, shaped by local contexts. These findings echo the emphasis in the literature on understanding the business environment through networking and community engagement as crucial factors for fashion designers' success (Malem 2008: 403; Chun *et al* 2017: 4477).

In South Africa, retailing fashion designers predominantly accessed information through Fashion Councils and significant industry events such as Fashion Weeks.

However, only 56 percent retailing fashion design entrepreneurs had insights on *attainable support information*, suggesting a gap in the widespread availability or awareness of support mechanisms (Jacobs *et al.* 2016: 1410). In addition, it is important to note such event-based approaches might not provide the same level of accessibility or continuous support as digital platforms, which can be accessed universally and at any time (as emerging fashion designers have realised). This distinction is supported by the observations that, while events could stimulate local engagement and provide immediate opportunities, they might not reach as broadly or effectively as online resources and international collaborations (Carbonaro and Votava 2009: 42).

In contrast, more than 80 percent designers in Germany reported having information related to support, with a framework for entrepreneurial support through international partnerships, and extensive use of online platforms and networks. To foster these types of relationships, networks and flow of information, studies and models on systems such as the hoop and close-proximity/closed-loop supply chains that enhance the accessibility of information and support for fashion entrepreneurs, are critical (Fernandes 2019:7-8; Poee 2020:73-78). Additionally, it is indicated that the fashion industry increasingly required intimate relationships and interactive engagements for success (Sun and Zhao 2018:373).

6.4.2 External Support Challenges

External support challenges highlighted common bureaucratic obstacles and a lack of responsiveness from support agencies in both countries. The extensive paperwork and complex administrative processes required to access support programmes consumed valuable time and resources that could, otherwise, be directed towards business development. These findings echoed the literature, where the inefficiency of government and institutional support structures were critiqued, as they often imposed stringent criteria that did not align with the practical realities of entrepreneurial ventures (Grundey and Daugélaite 2009: 118). Such bureaucratic obstacles were seen as a major barrier to effective support, as they discourage fashion design entrepreneurs from engaging with these systems, due to the cumbersome and time-consuming nature of the processes involved. Additionally, there were frustrations with past

support efforts and a perceived disconnect between support structures and the needs of fashion designers. This indicated that a gap needed to be bridged in navigating industry challenges, reducing risk, and providing access to essential resources such as grants and investments (Pooe and Mugobo 2019: 73; Tremblay and Yagoubi 2014: 204; Brydges and Pugh 2017: 958).

In Germany, there were additional challenges and frustrations expressed with specific external support's inability to yield tangible business outcomes, which suggested a gap with the intended mission of some external organisations to support and assist retailing design entrepreneurs with business growth and development (Virani and Banks 2014: 2), but instead, focused on what was deemed by retailing fashion design entrepreneurs as "superficial support". This criticism of Fashion Week reflected a broader critique found in the literature regarding the effectiveness of such events in truly supporting business development, as opposed to merely providing visibility (Sun & Zhao 2018: 373). The finding in Germany also suggested that established retailing fashion designers had less support than emerging ones, reflecting a perceived imbalance in the allocation of resources and opportunities by the fashion support structures, which is one of the apparent gaps in the literature.

In South Africa, the challenges were compounded by difficulties accessing funding due to stringent criteria, such as revenue thresholds, which may not be feasible for all entrepreneurs, particularly those emerging from educational institutions. The disconnect between the actual retailing requirements and the educational curriculums further exacerbates the situation, creating a mismatch between the skills taught and industry needs. This discrepancy highlights a significant issue noted in the literature, where educational programmes in fashion design often failed to align with the practical demands of the industry, leading to a gap in the preparedness of graduates entering the market (Fernandes 2019:7-8).

6.4.3 Impact of External Support

The findings regarding the *impact of external support* on retailing fashion designers in South Africa and Germany aligned closely with the literature on the importance of support for business growth and development (Virani and Banks 2014: 2). In both

contexts, formal programmes, mentorship initiatives, and access to resources, for example, financial aid and machinery, were highlighted as crucial for personal and professional development. Emerging fashion designers in both countries have recognised the value of formal programmes and mentorship initiatives. These resources were essential for guiding business processes and fostering personal and professional development, particularly valuable during the formative stages of a fashion designer's career.

The importance of formal programmes and mentorship in guiding business processes and development is supported by Chen (2019), who noted that mentorship provided valuable guidance on strategic decision-making and industry best practices. Furthermore, mentorship was found to bridge the gap between theoretical knowledge and practical application, which is vital in the fast-paced fashion industry (Msimango-Galawe 2022: 95). Such support is particularly vital in navigating the complex landscape of fashion design entrepreneurs in retail, where practical skills and industry knowledge play critical roles in business success.

The South African findings underscored the instrumental role of external support in enhancing designers' market understanding and providing practical experience, resonating with literature, in which the importance of intermediary organisations in reducing risk and isolation is emphasised (Tremblay and Yagoubi 2014: 204). Access to resources such as financial assistance and machinery was highlighted as particularly beneficial during challenging periods such as the COVID-19 pandemic. South African designers emphasised how this support was crucial for sustaining operations during economic downturns. This aligned with findings that highlighted the critical role of financial and material support in enhancing operational capacity and resilience, allowing businesses to maintain continuity under adverse conditions (Leoński 2022: 583).

The availability of machinery and financial assistance, furthermore, found support with Grundey and Daugėlaitė (2009: 118), who emphasised the role of industrial partnerships in providing external expertise and technology, thereby improving production processes and competitiveness. Additionally, eminent South African fashion designers discussed the drawbacks of premature international exposure,

which led to production demands that exceeded their operational capabilities, resulting in quality issues and potential reputation damage. This scenario underscored the literature's caution regarding the alignment of support services with the actual capabilities and needs of businesses, emphasising the need for support that is not only well-intentioned but also well-aligned with the business' operational stages and capacities (Ogujiuba *et al.* 2023: 14).

In Germany, the findings likewise highlighted the significant impact of networks and social impact movements in increasing designers' visibility and facilitating funding opportunities (Brydges and Pugh 2017: 958). These findings further underscored the strategic value of relationships and networks (Naudé and Sutton-Brady 2019: 27-35). However, the constraints imposed by conditions attached to financial assistance, which direct the use of funds towards specific areas such as marketing, highlighted a misalignment with the critical success areas of businesses. This scenario calls for a more flexible and tailored approach to funding, as supported by Leoński (2022: 583), who argued that the agendas of BSOs should align more closely with the needs of all entrepreneurs rather than merely a few dominant players. This issue was further noted when addressing the need for flexible and tailored support that allowed entrepreneurs to allocate resources according to their strategic priorities and actual needs (Bergman and McMullen 2021: 688).

Another aspect highlighted in Germany was networking through industry collaborations, which was noted as a key factor in enhancing visibility and accessing necessary resources. Organisations such as the Fashion Council of Germany, were instrumental in connecting designers with funding opportunities and other resources, facilitating significant visibility and brand growth. In the literature this finding was echoed, highlighting that robust networks provided vital platforms for information exchange, opportunity identification, and visibility in the competitive market (Todeva and Rakhmatullin 2016: 9-10).

6.4.4 Financial Support Needs

Financial support needs were diverse, ranging from equipment acquisition to operational expenses and expansion efforts. South Africa and Germany emphasised

the importance of financial support across various aspects of their fashion businesses. Both countries emphasised the crucial role of financial assistance in managing multiple aspects of the value chain within fashion businesses, including design, production, distribution, and marketing. These findings closely aligned with Ünay and Zehir (2012: 318), who stated that business success depended on the business model, marketing, and finances, with the involvement of industrial partners. Ultimately, the financial support needs of retailing fashion design entrepreneurs in both countries addressed all of the aspects of the 6Ps. These results indicated that, indeed, the retail mix interlinked and added value to the fashion merchandising concept associated with the buying and selling, product assortment, planning, product acquisition, pricing, presentation and sales (Burns and Mullet 2020: 3).

In South Africa, the interviews with fashion design entrepreneurs related to financial support needs ranged from equipment acquisition, to operational expenses and expansion efforts. This resonated with the literature, highlighting the importance of intimate relationships between fashion designers, manufacturers, and consumers (Sun and Zhao 2018: 373), with the empirical findings proving additions to the list related to expansion efforts. The significant capital requirements for equipment and operational expansion highlighted by South African entrepreneurs reflect the broader challenges identified in the literature. Bhambani (2023: 2974) discussed how effective financial strategies were crucial for managing supply chain uncertainties and securing expansion funding, which was essential for sustaining business operations and facilitating growth.

The interviews with fashion designers in Germany similarly revealed a shared recognition of the importance of strategic investment in HR, production, research, and marketing to support business growth. The need for strategic investment in HR and structural changes, discussed by German fashion design entrepreneurs, was endorsed by Rashid and Barnes (2021: 371), who argued that integrating retail and wholesale operations could significantly boost a brand's market presence by optimising market access and operational efficiency.

The value of HRM created in businesses through employee strategic management was additionally recognised as essential (Rotich 2015: 58, 70). Furthermore, the

abovementioned findings signified that retailing fashion design entrepreneurs were still identified as companies, associations or individuals involved in the clothing business, where the primary focus is on design, with some level of managing their manufacturing processes (Kusumsiri and Jayawardane 2013: 67). While the importance of financing marketing efforts indicated that retailing fashion design entrepreneurs required both B2C and B2B marketing efforts such as advertising, sales promotion, public relations, and personal selling, along with direct marketing, advertising, demonstrations, and fashion shows, in addition to visual merchandising, campaigns, special appearances, and formal productions, as well as institutional events to communicate their critical success factors (Kovač *et al.* 2021: 24; Diamond *et al.* 2015: 280). Generally, the findings aligned with the literature, emphasising the critical role of financial support in driving the success and growth through promotional efforts of fashion design entrepreneurs in both countries. However, this study recognises that those promotional efforts should be strongly aligned with critical success factors.

The literature basically complements the findings by addressing the strategic importance and challenges of financial support. Ilchenko and Kiselev (2022: 1) provided an important perspective, highlighting that the provision of financial support by BSOs [and external support] was not without challenges, and entrepreneurs often faced barriers such as inadequate technical skills and poor market access. This hindered the effective utilisation of financial resources, and to address those challenges, innovative financial tools and systematic support were necessary to ensure social, economic, and environmental impacts.

6.4.5 Recommendations from Retailing Fashion Design Entrepreneurs

The findings on *implementation recommendations* for external support in the fashion industry in Germany and South Africa resonate closely with the literature on the importance of collaborative platforms, practical support, and government intervention in fostering entrepreneurial success (Tremblay and Yagoubi 2014: 204-205; Brydges and Pugh 2017: 958; Poole 2020: 179).

In both countries, there was a unanimous call for greater collaboration and knowledge-sharing platforms within the industry, echoing literature that emphasised the role of

intermediary organisations in reducing fragmentation and isolation (Tremblay and Yagoubi 2014: 204). This desire for increased collaborative opportunities also aligns closely with Osmani (2020: 120-121), who highlighted that smaller, cohesive groups in business collaborations could enhance decision-making and operational efficiency, providing a significant advantage in dynamic business environments. The emphasis on organising forums and events where designers could exchange ideas and collectively propel the industry forward reflected the recognition of the benefits of such collaborative efforts (Virani and Banks 2014: 2).

The emphasis on the need for practical support, such as financial management guidance and access to funding, found strong support in the literature. Msimango-Galawe (2022: 95) underscored that non-financial training programmes focusing on marketing innovation, risk-taking, and management skills could have a greater effect on entrepreneurial success than financial training alone, suggesting a broad-based approach to support mechanisms. Mentorship programmes and guidance from experienced professionals were deemed essential for navigating the business aspects of the fashion industry, consistent with the emphasis on the role of mentorship in entrepreneurial success (Tremblay and Yagoubi 2014: 205).

There was additionally a shared recognition of the need for government intervention, including research-driven support initiatives and sector-specific policies, mirroring literature that emphasised the role of policymakers in supporting business growth within the creative sector (Brydges and Pugh 2017: 958). McQuaid (2002: 909) also supported these findings, discussing the importance of regional and local policies in creating conducive environments for fashion design entrepreneurs, which focus on macro-level stability and micro-level supports such as training, technology transfer, and market access. In both contexts, involving fashion designers in developing strategies and policies was highlighted as crucial for fostering sustainable growth within the industry, echoing the importance of stakeholder involvement in policy formulation (Fernandes 2019: 7; Pooe 2020: 179). In South Africa, the specific suggestions for more retail opportunities and fabric availability aligned with Gurova and Morozova (2018: 705), who noted the proliferation of new retail outlets and markets driven by entrepreneurs. This showed a direct correlation with the call for localised support in expanding market access and material sourcing.

The findings suggest support systems must be adaptable to the varying needs of fashion entrepreneurs, whether they are emerging or established. Leoński (2022: 583) argued that the influence of BSOs varied and ensuring these organisations represent a broad spectrum of interests within the fashion industry was crucial for aligning support with actual needs. Tailoring support to these varying needs is essential, as discussed in the broader literature on fashion entrepreneurship, which stresses the importance of aligning support mechanisms with specific market dynamics and entrepreneur characteristics (Grundey and Daugėlaitė 2009: 118; Malm 2008: 403). Ultimately, the empirical findings from both regions suggest a strong consensus on the need for enhanced collaboration, practical support, and targeted government intervention. The literature not only supports these findings but also expands on them, detailing how such strategies can be effectively implemented to foster a thriving and sustainable fashion industry.

6.5 CHAPTER SUMMARY

This chapter synthesised the findings from all objectives to provide a comprehensive understanding of the factors that influenced the success of retailing fashion design entrepreneurs and the role of external support. The integrated perspective was crucial for developing holistic and effective policy recommendations and frameworks. Based on the synthesis, this chapter formulated specific policy-guidelines aimed at sustaining the critical success factors identified. Those recommendations were grounded in the empirical data and specific theoretical insights (kano model and the shopping preference theory) discussed throughout the thesis, ensuring their relevance and applicability. Generally, the study objectives and findings can be summarised through the balanced scorecard theory, which measured and motivated business unit performances by evaluating customers [needs], which was covered through objectives 1 and 2, the internal processes [in connection to external support] and financials [support needs], covered through objectives 3 and 4 and learning or education and growth, covered through all the objectives (Kaplan and Norton 1996: 54), and ultimately covering objective 5. The balance scorecard theory will, additionally, be adapted to summarise and provide recommendations for this study, in the following concluding chapter.

CHAPTER SEVEN: CONCLUSION AND RECOMMENDATIONS

Chapter 6 outlined the findings in relation to the theory and literature discussed in this study. This chapter aims to weave together the analysis, discussion, and insights that have emerged throughout this study, to present a coherent summary of key findings and recommendations, articulate the theoretical and practical implications, chart a path forward for future studies and draw conclusive insights. By offering recommendations grounded in the study findings, this chapter contributes actionable insights and a framework through the balanced scorecard theory to stakeholders for nurturing a thriving, sustainable, innovative fashion industry in Germany and South Africa.

In acknowledging the inherent limitations of this study, this chapter, in addition, transparently discusses potential sources of bias or constraints that may have influenced the findings. Furthermore, the avenues for future research will be presented, suggesting research for further investigation that promises to enrich the understanding and support for retailing fashion design entrepreneurs. In essence, this is not only the concluding chapter but also serves as a beacon, guiding future research, policy formulation, and external support towards fostering environments that amplify the success and global competitiveness of retailing fashion design entrepreneurs.

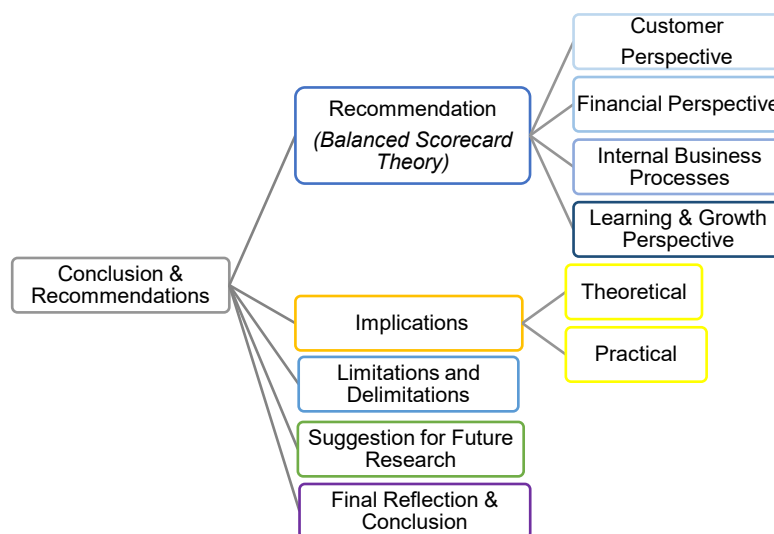


Figure 26: Chapter 7 Outline

Source: Developed by Author

7.1 RECOMMENDATIONS

The balanced scorecard theory will be applied as a framework to provide the recommendations for this study. This theory, discussed in chapter 3 in detail, developed by Kaplan and Norton, traditionally evaluated an organisation's performance from four perspectives: Financial, Customer, Internal Business Processes, and Learning and Growth (Kaplan and Norton 1996), deemed appropriate for this study.

7.1.1 Customer Perspective

The quantitative section examined the importance of understanding local consumer preferences as a critical success factor, indicating significant variations between German and South African markets. In light of the findings regarding customer perspectives in both Germany and South Africa, retailing fashion design entrepreneurs are encouraged to adopt specific strategies tailored to the preferences identified in each market, while also considering overarching strategies that address similarities across these distinct landscapes.

Both markets showed that product functionality significantly influenced customer satisfaction, while the German market indicated greater interest in sustainable products, by also gravitating towards authentic localism and product equity. As both markets showed a marked preference for functional fashion products, there is a need for fashion offerings that are more practical, durable and versatile, while suited to local climate conditions and lifestyle needs. The omnichannel retailing approach, combining online and offline experiences, was highlighted as a strategy to enhance customer engagement in both contexts, indicating a need for technological innovations that streamlined consumers' online and offline retail processes. With this in mind, external support is recommended to concentrate on supporting new retail formats for fashion design entrepreneurs who encompass omnichannel retention. Moreover, considering the feedback and recommendations from retailing fashion design entrepreneurs for external support to involve them in developing strategies and policies, it would further be recommended the new retail formats supported should be conceptualised with retailing fashion design entrepreneurs and guidelines.

Across both markets, the initial consumer indifference towards most retail mix factors suggested an opportunity for entrepreneurs to streamline operations and focus on delivering value in areas most impactful to customers. There was potential to transform these indifferent attributes into attractive qualities by introducing a more streamlined omnichannel shopping experience for consumers and functional products, emphasising product sustainability in Germany. However, with the movement of price towards a reverse attribute, careful pricing strategies were essential. Retailing fashion design entrepreneurs should ensure any premium pricing was justified by tangible benefits and communicated transparently to avoid customer dissatisfaction. Furthermore, the pricing strategies of retailing fashion design entrepreneurs should be based on brand positioning, dependent on the level of the brands' exclusivity. With that in mind, it is highly recommended for retailing fashion design entrepreneurs to consider offering low to medium to high premium price ranges. The premium price ranges are thus recommended to be divided as follows dependent on the brand's positioning as a highly premium exclusive brand or a streetwear/everyday wear accessible brand:

- Low premium prices for basic fashion products.
- Middle premium prices for brand specific fashion products.
- High premium prices for elaborated fashion designs.

With that in mind, it would be recommended that retailing fashion design entrepreneurs and external support focus on customer value perception, market positioning and branding, product and service improvement, pricing strategy revaluation and enhanced communication related to product/brand values. Considering there is already a considerable amount of marketing support (with seven identified in South Africa and three in Germany), it is highly recommended that those marketing support efforts be directed towards pricing communication related to product/brand values, in order to educate consumers on the premium prices attached to fashion designers' sustainable products.

In South Africa, building and enhancing omnichannel capabilities and innovative omnichannel retail structures should be a focal point for fashion design entrepreneurs

in response to consumers' future intentions to patronise omnichannel retailing. Ensuring consistency and seamless integration across all shopping channels, from online platforms to in-store experiences, is vital. For the German market, fashion design entrepreneurs should prioritise enhancing innovative online shopping experiences, as digital platforms are a critical touchpoint for consumers. This includes investing in intuitive user interfaces, high-quality digital product imagery, and innovative technologies such as virtual try-ons. Additionally, there was an apparent demand for products that embody authentic localism and product equity, highlighting the importance of leveraging sustainable materials sourcing and transparent production processes in storytelling and brand communication.

With this customer perspective section, the recommendations focused on how retailing fashion design entrepreneurs could enhance customer patronage and the factors external organisations are required to focus on to ensure fashion design retailers are adequately supported. These recommendations are intended to ensure that external support ultimately aligns with consumer needs, offering relevant support to retailing fashion design entrepreneurs to sustain the critical success factors related to market demand and customer satisfaction.

7.1.2 Financial Perspective

This financial perspective sheds light on the essential nature of financial backing, investment, and support mechanisms that fashion design entrepreneurs necessitate to ensure success with their businesses and navigate the challenges, while capitalising on the opportunities within the retail industry. This study revealed that retailing fashion design entrepreneurs in both countries required unique financial support. In response to the detailed exploration of financial support needs among fashion design entrepreneurs in South Africa and Germany, this study unveiled a compelling case for a multifaceted approach to external support, basically covering all the retail mix factors. It was evident that financial assistance spanned a broad spectrum, touching on essential aspects such as equipment acquisition for production purposes, operational expenses, HR and marketing, as well as store development, and expansive efforts to scale the business. This intricate web of financial needs ranged from R30 000 to R5 million in South Africa and from €8 000 to €500 000 in

Germany. Therefore, external support should bear this range in mind when considering financial support, which should prioritise critical success factors.

With this range of financial needs from retailing fashion design entrepreneurs, a blend of financial grants, low-interest loans, and investment opportunities is recommended, specifically tailored to address the diverse needs, from the grassroots of equipment, shop/rail rentals and operational expenditures, to the zenith of research, development, and market expansion. Furthermore, it is highly recommended that financial assistance be offered according to retailing fashion designers' industry experience by classifying them as emerging and established in Germany and to include eminent fashion designers in South Africa, as each level of expertise demonstrates varying financial needs, dependent on the business model.

The difference between South Africa and Germany was that South African retailing fashion design entrepreneurs preferred grants and investors over loans (even low-interest loans), as the fashion designers in South Africa perceived loans as high risk for their business. However, retailing fashion design entrepreneurs in Germany gravitated towards low-interest loans and welcomed grant opportunities. Table 7.1 illustrates the recommended breakdown of the financial support for each country. The table outlined a recommendation for various financial support mechanisms for South African and German fashion design entrepreneurs, categorised by their career stages: emerging, established, and eminent.

For emerging fashion designers in South Africa, the support is Tier 1 funding with start-up grants and collective funding. In contrast, their counterparts in Germany are recommended to also receive similar types of funding, along with low-interest loans. Established retailing fashion designers in South Africa would then have access to Tier 2 funding, with business developmental grants, partnership or small collaborative funding, internationalisation grants, and venture capitalist interactions within the industry. German established fashion designers would also benefit from business expansion grants, reasonable-interest loans, personalised banking, and broader access to venture capitalists, both domestically and internationally, in addition to internalisation grants. At the eminent level, South African fashion designers can access Tier 3 funding, which includes long-term business expansion grants and

external venture capitalist access, alongside continued access to Tier 2 funding structures. This table highlights a structured financial support system that escalates with the designers' career progress, tailored to specific needs at each stage in South Africa and Germany.

Table 7.1: Breakdown of Financial Support Needs

	South Africa	Germany
Emerging Fashion Designers	Tier 1 Funding • Start-up Grants • Collective Funding	Tier Funding • Start-Up Grants • Collective Funding • Start-up Grant • Low-Interest Loans
Established Fashion Designers	Tier 2 Funding • Business Developmental Grants • Partnership or Small Collaborative Funding • Internationalisation Grants • Access to Venture Capitalists and Investors in Industry	Tier 2 Funding • Business Development and Expansion Grants • Partnership or Small Collaborative Funding • Reasonable-Interest Loans • Personalised Banking • Access to Venture Capitalists and Investors in and outside of Industry
Eminent Fashion Designers	Tier 3 Funding • Business Expansion Grants, with tranche payments and long-term arrangements • Access to Venture Capitalists and Investors outside of the industry • Access to Tier 2 Funding structure	• Internalisation Grants

Primarily, the cornerstone of these financial recommendations lies in offering comprehensive financial education/training to fashion design entrepreneurs. By equipping them with an in-depth understanding of financial planning, investment strategies, and the dynamics of financial markets, these educational programmes would be aimed at scaffolding the entrepreneurs' ability to navigate the financial complexities of managing various financial support sources and successfully running a sustainable retailing fashion business.

With the recommendations from this financial perspective, the financial needs of retailing fashion design entrepreneurs were addressed. The specified policies could sustain the critical success factors by addressing financial barriers through financial stability and operational efficiency.

7.1.3 Internal Business Processes Perspective

The comprehensive analysis of external support for retailing fashion design entrepreneurs, from an internal business perspective across South Africa and Germany, coupled with their respective markets, underlined the imperative need for tailored, strategic support mechanisms. These mechanisms should be aimed not only at bridging the existing gaps between critical success factors and the current external support available but also at harnessing the potential to foster robust business growth and development for the business of retailing fashion design entrepreneurs.

In South Africa, the findings revealed a critical emphasis on the significance of production and manufacturing support, coupled with trading and distribution assistance, which was paramount to the entrepreneurs' success. However, a noticeable shortfall existed in adequately addressing those needs, particularly in production and manufacturing, where only a minimal focus was identified from external support entities. Moreover, the absence of omnichannel support reflected a significant oversight, in view of its emerging importance within the retail mix. The underrepresentation of business partnership and sales information support further accentuates the critical gaps requiring immediate attention from external support frameworks.

To address those challenges, effective management of the supply chain, from sourcing materials to delivering finished products, was crucial. Hence, South African external support entities should intensify efforts to provide comprehensive production and manufacturing assistance that reflects the market's predominant requirements. Additionally, developing programmes and initiatives aimed at facilitating omnichannel strategies and enhancing business partnership and sales information capacities, could significantly amplify fashion design entrepreneurs' operational efficiency and market reach.

In Germany, the diverse needs for support across the retail mix, with a pronounced focus on trading and distribution and retail location support, underscored the complexity of navigating the retail landscape. Interestingly, the attention to pricing support elucidates the entrepreneurs' understanding of strategic pricing mechanisms, contrasting with the relatively lesser focus in South Africa. The lack of mention concerning sourcing support diverges from South African concerns, indicating a different set of challenges and priorities within the German fashion industry.

To tailor external support effectively, German entities should continue to provide balanced support across various aspects of the retail mix. However, a particular emphasis is required on enhancing trading and distribution networks, retail location strategies and maintaining the production of slow fashion products. In addition, incorporating pricing support initiatives could further empower entrepreneurs with the knowledge and tools necessary for developing effective pricing strategies, thereby fostering a competitive edge in the market.

The similarities between both countries, on the whole, highlighted a universal call for external support entities to adopt a more integrated, collaborative approach towards addressing the diverse needs of retailing fashion design entrepreneurs. Thus, the call for fostering partnerships and collaborative efforts cannot be overstated. By facilitating networks that bridge support entities, fashion designers, manufacturers, and consumers. These partnerships possess the potential to fortify the industry's value chain, ensuring a seamless integration of support entities, design, production, and market accessibility. Additionally, by acknowledging the pivotal role of HR, there was an expressed need for support initiatives that bolster strategic investment in talent and facilitate access to industry expertise and mentorship. Ultimately, for internal business structures, personnel supporting omnichannel retailing and slow products offering would also be highly recommended.

One of the essential discussions that emerged, was that fashion designers needed to be involved and included in the strategy and policy development processes, as that could ensure the measures introduced were comprehensive and pragmatically aligned with the industry's real-time needs and aspirations. Another aspect was that

establishing platforms for knowledge sharing and collaboration could significantly reduce industry fragmentation and foster a sense of community and collective growth. Practical support, including access to funding, alongside mentorship programmes, emerged as a critical need, underscoring the importance of equipping entrepreneurs with the skills and resources essential for navigating the complex business landscape of the fashion retail industry.

Ultimately, this perspective focused on improving the internal operations of fashion design retail businesses. By enhancing internal capabilities, these policies could help sustain critical success factors through operational efficiency and productivity.

7.1.4 Learning and Growth Perspective

The Learning and Growth Perspective plays a pivotal role in defining the trajectory of success for fashion design entrepreneurs in South Africa and Germany. This perspective highlights the essence of continuous improvement, innovation, and strategic skill enhancement within the industry.

For South African fashion design entrepreneurs, the emphasis should be placed on skill development for emerging fashion design entrepreneurs, particularly in areas that deal with the operational and logistical challenges inherent to the market. Initiatives explicitly aimed at enhancing supply chain management with production optimisation were vital. Moreover, fostering innovation in sustainable practices by encouraging the adoption of green technologies for omnichannel retailing and sustainable material sourcing for functional products, could significantly contribute to the evolution of a more sustainable fashion retail industry within the country.

Conversely, leveraging the country's advanced digital infrastructure for technological integration into the omnichannel business models presented a unique opportunity in Germany. Fashion design entrepreneurs are recommended to also learn and grow e-commerce platforms, virtual reality for design and fitting, and artificial intelligence for gaining customer insights. Moreover, strengthening the bond between fashion designers and local artisans would promote authentic localism, enhancing the appeal of German fashion on the global stage by embedding local craftsmanship into its

narrative. Suggesting that incorporating training of local artisans into retailing fashion designers' businesses could be highly beneficial.

Across both South Africa and Germany, the creation of robust networking and collaborative platforms emerged as a universal need. Such platforms could facilitate meaningful connections across the value chain, between emerging and established or eminent retailing fashion designers to suppliers to large retailers, in order to foster a supportive ecosystem conducive to growth, learning and collaboration. Similarly, enhancing business acumen among retailing fashion design entrepreneurs through access to mentorship, business management training, and financial literacy workshops, was essential. This would ensure a solid foundation for strategic decision-making and sustainable business growth.

This study, therefore, recommends that for mentorship programmes, external organisations should focus on supporting the following framework:

- Entrepreneur to Entrepreneur mentorship programme: For personal business development and acumen.
- Fashion business as a whole to Fashion business mentorship programmes: Where different business departments are mentored by a more established or eminent business.
- Large retailers to retailing fashion design entrepreneurs: Retailers with an established market share and national or international footprint mentor independent retailing fashion design entrepreneurs.

With regard to increasing networking and learning platforms within the industry to facilitate support, the recommendation would be for focused workshops, seminars, conferences and summits for the varying business levels of the retailing fashion designers' entrepreneurship journey. For example, external organisations could consider the following outline:

- Emerging fashion designer workshops
- Established fashion designer seminars
- Eminent fashion designer summits
- Industry specific conferences

Furthermore, advocating for a culture of research and development would support the industry's drive towards innovation, keeping pace with global trends and challenges. Through research and development, the possibility of innovative, new and sustainable retail formats, pioneered by retailing fashion design entrepreneurs, become increasingly possible. By providing funding and resources for new functional materials and omnichannel technology exploration, retailing fashion design entrepreneurs could pioneer sustainable and innovative solutions. In addition, fostering an environment of continuous learning through industry conferences, seminars, consumer engagements through informative platforms, and online resources, as well as peer-to-peer learning initiatives, ensured the entrepreneurs remained agile and informed.

Broadly, the role of government and policy support cannot be understated. Advocating for policies that address the unique needs of the fashion retail industry, specifically for designers, could significantly influence the sector's growth trajectory. It is important to stress that the needs of the fashion retail sector at large and of retailing fashion design entrepreneurs, should be unequivocally separated where external support policies and structures are concerned, as the size of the businesses and capabilities differ significantly. For retailing fashion design entrepreneurs, more bespoke external support mechanisms should be implemented, with the assistance of consultants, educational institutions, mentors, and/or industry colleagues. Figure 27 summarises the recommendations through the balanced scorecard diagram for South Africa and Germany.

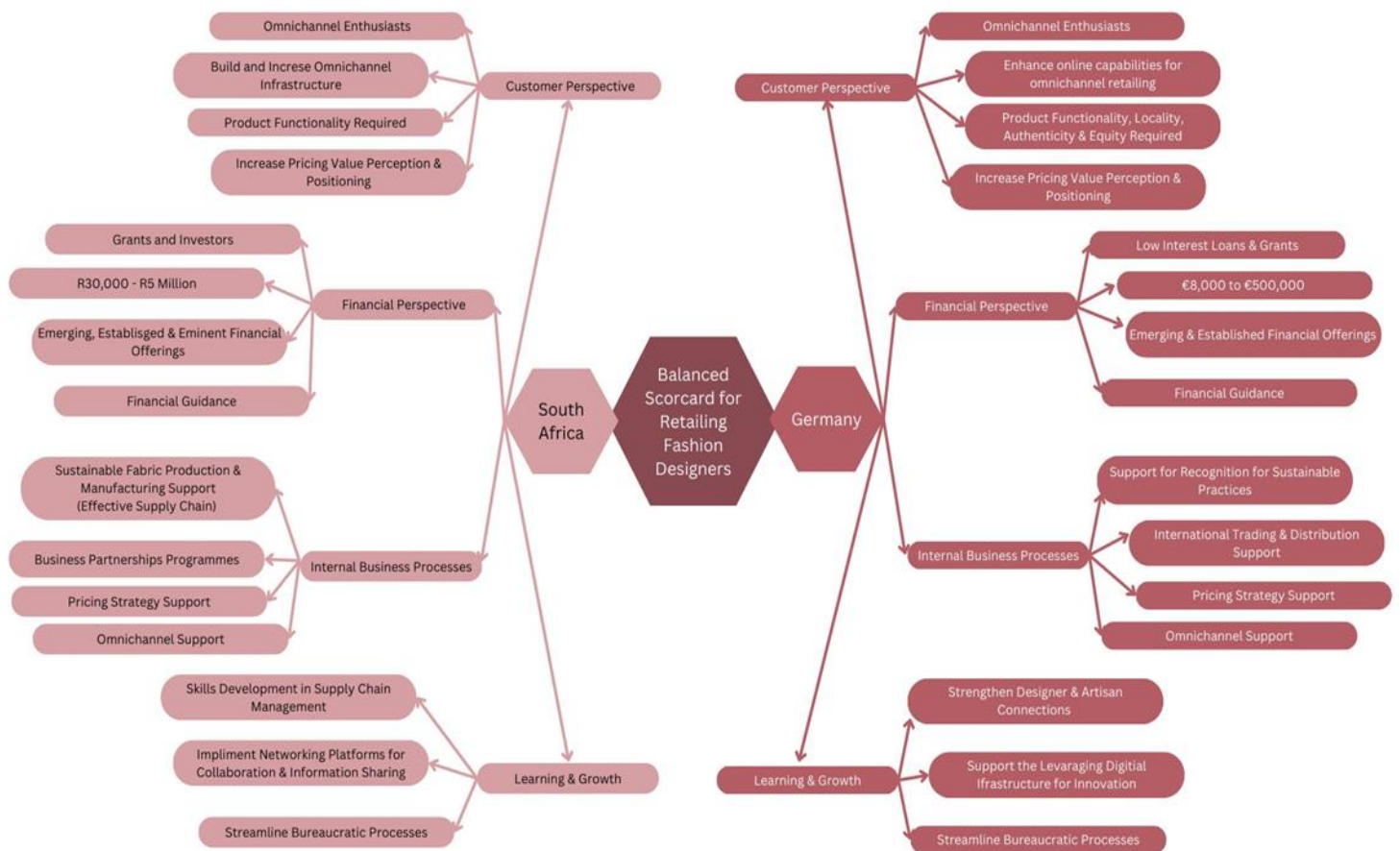


Figure 27: Balanced Scorecard for Retailing Fashion Designers & External Support

Source: Developed by Author

7.2 IMPLICATIONS OF RESEARCH

The ultimate goal of this study is to bridge the gap between theory and practice, ensuring that the study's outcomes have tangible benefits for the targeted industry and academic community. With that in mind, this study yields significant implications across the board, from a theoretical viewpoint to practical implications for fashion design entrepreneurs, to the broader retail industry and policymaking spheres.

7.2.1 Theoretical Implications

Considering the focus of this study, the theoretical implications intertwine closely with the specific theories covered in this study. First, with the retail mix framework, the EFA revealed there were 5Ps instead of 6Ps for retailing fashion designers, namely place, product, price, and promotional-presentation, as well as personnel, because

consumers identified promotion and presentation as one construct. Furthermore, there was an emphasis on place of sale and product functionality (with local-authenticity and product equity in Germany), elucidating a 2Ps retail mix as critical success factors in the context of fashion design entrepreneurs. As a result, this study enriched the retail mix framework by highlighting evolving consumer preferences towards slow fashion and omnichannel retailing experiences, urging a re-evaluation of the traditional retail mix components, for retailing fashion design entrepreneurs to better accommodate these emerging trends. This suggests the retail mix framework could be contracted or expanded for specific industries, and in this instance, it was for retailing fashion design entrepreneurs.

Second, the kano model illuminated the evolving criteria of customer satisfaction within the fashion retail sector. The analysis indicated that most consumers remained indifferent towards offerings from fashion design entrepreneurs, a revelation with significant theoretical implications, as it enhances the current discourse on customer satisfaction and value perception in the retail fashion domain. Notably, the model revealed a hierarchy of consumer preferences, where indifferent attributes precede attractive ones. This hierarchy underscores the necessity for a dynamic understanding of customer needs, moving from being indifferent to being attracted to specific offerings, advocating for a model that adapted to shifting market trends.

Applying the kano model also brought forth theoretical contributions to the retail mix framework, particularly in refining the categorisation of the 5Ps within the kano framework. This approach emphasises the importance of focusing on specific retail mix elements based on market feedback. For instance, consumer inclination towards slow fashion and omnichannel approaches presents a strategic opportunity to integrate these dimensions explicitly into the kano model, suggesting a tailored approach to understanding and leveraging consumer preferences.

Third, the shopping preference theory, which explored consumer motivations and behaviours in choosing where and how to shop, offered a vital lens through which to interpret the study findings, particularly regarding consumer preferences for omnichannel experiences and the emphasis on slow fashion products (or sustainable products) and omnichannel development (or retail place technological innovation).

Therefore, this study's insights into omnichannel retailing preferences and the significant emphasis on slow fashion products and sustainability practices, could be seen as an application and extension of the shopping preference theory.

Last, this study's application of the balanced scorecard theory to analyse fashion design entrepreneurs' performance and strategic alignment offered insights into the model's adaptability outside traditional corporate settings. By evaluating the critical success factors across financial, customer, internal business, and learning & growth perspectives, the research highlighted the theory's versatility in capturing the multifaceted nature of entrepreneurial success in the fashion retail industry. The findings suggested extending this theory to incorporate industry-specific variables, such as sustainability practices linked to slow fashion products and digital transformation related to omnichannel developments, proposing a more dynamic framework for assessing and guiding entrepreneurial ventures.

By integrating these theoretical frameworks into the analysis of retailing fashion design entrepreneurs and external support, this study applied existing theories to a new context and suggested areas for expansion and adaptation. The practical implications of this theoretical grounding provided a roadmap for entrepreneurship, support entities, and policymakers to foster a more supportive and sustainable fashion retail industry.

7.2.2 Practical Implications

On the practical side, this study offered implications that provided actionable insights to potentially guide strategic decisions and support initiatives aimed at fostering industry growth and sustainability.

For fashion design entrepreneurs, this study underlined the importance of tailoring business strategies to specific market needs and consumer preferences. In practical terms, this meant that retailing fashion designers should invest in understanding their target markets' and consumer behaviour. The emphasis on slow fashion practices and omnichannel developments highlighted by this study suggested entrepreneurs should integrate sustainable practices and digital technologies into their business models.

This could involve adopting sustainable materials, implementing efficient production processes, increasing personnel capabilities and leveraging e-commerce platforms integrated into brick-and-mortar strategies, in order to enhance customer engagement and reach. Additionally, the practical implication of price premiums moving towards the reverse attribute in the kano model suggests that retailing fashion designers needed to adjust their pricing strategies and promotional efforts accordingly.

Industry support organisations, including fashion councils, government departments, and incubators, should draw practical guidance from the findings to refine their support programmes and focus on critical success factors first. Recognising the diverse needs of retailing fashion design entrepreneurs, external organisations should offer specialised programmes that provide targeted assistance in areas such as skill development (aimed at pricing strategies, sustainable production and omnichannel development), access to financing, and market entry strategies. Additionally, facilitating networking opportunities and collaborative platforms could help entrepreneurs connect with suppliers, retailers, and peers, fostering a supportive ecosystem that encourages knowledge sharing and partnership.

Policymakers have a critical role in creating an enabling environment for retailing fashion design entrepreneurship. The study's insights into the external support needs of fashion entrepreneurs indicated that policies should focus on reducing bureaucratic barriers, offering tax incentives for start-ups, and providing grants or subsidies for sustainable slow fashion and omnichannel technological innovations. Moreover, policy initiatives should enhance education and training in the fashion sector, ensuring entrepreneurs and their personnel are equipped with the necessary skills and knowledge to thrive in a competitive global market.

Educators and academic institutions could also derive practical implications from the study, particularly regarding curriculum development and educational programming. Incorporating courses on slow or sustainable fashion practices, omnichannel retailing, and entrepreneurship specifically tailored to the fashion industry, could help prepare the next generation of retailing fashion design entrepreneurs for the challenges and opportunities of the market. Partnering with each other (institution to institution) and

industry practitioners to offer workshops, internships, and mentorship programmes could offer aspiring retail fashion design entrepreneurs students valuable hands-on experience and industry insights.

In summary, by focusing on market-specific strategies, slow fashion factors for sustainability, technological innovation and personnel capabilities to advance omnichannel retailing, and strategic pricing retailing, fashion design entrepreneurs and industry stakeholders could navigate the complexities of the fashion industry more effectively, driving innovation, competitiveness, and sustainable growth.

7.3 LIMITATIONS AND DELIMITATIONS

This study focused on uncovering the critical success factors and external support needs of retailing fashion design entrepreneurs in South Africa and Germany, navigates within certain limitations and delimitations that define its scope and implications. Geographically, the study's concentration on these two distinct markets limits its generalisability, as South Africa and Germany's unique economic, cultural, and regulatory landscapes may not fully represent the broader global fashion industry's dynamics.

In terms of methodology, the scope of the dimensions chosen was limited to measuring the level of importance and patronage from consumers, instead of the drivers behind the patronage. Furthermore, the research's depth and breadth were further shaped by the sample size of respondents in both the quantitative and qualitative sections. For instance, for the quantitative section, there was a difference of 8.7 percent between the targeted and reached quotas for LSM 10 in South Africa, which signified that the group was not highly represented. With the qualitative research, the range of business sizes, market focuses, and levels of experience might not have captured the entire spectrum of perspectives within the fashion sector. For instance, no eminent retailing fashion designers were reached in Germany, meaning one perspective was not captured. However, the closely related views in South Africa between established and eminent retailing fashion designers demonstrated that although there was a participant representation gap in Germany, it may not have had a significant outcome.

Deliberately focusing on retailing fashion design entrepreneurs as the study subjects in the qualitative data collection, allowed for an in-depth exploration of the challenges and support mechanisms pertinent to this group but excluded a broader supply chain and industry stakeholders' views, such as producers and manufacturers, wholesalers, consultants, and educators or academics. The selection of South Africa and Germany was a strategic delimitation to draw comparative insights from two markedly different market environments. Yet, it omitted a broader examination that could encompass additional African and other contexts. Lastly, by concentrating on independent fashion designers with retail offerings, this study provided detailed findings specific to this sector's unique dynamics but did not account for the broader array of challenges and opportunities present in other entrepreneurial fields, such as fashion designers working for larger retailers (not independent) or fashion designers focused on bespoke offering.

These limitations and delimitations precisely contour the study's framework, carving out a specific narrative path that offers focused insights, while acknowledging the boundaries of its exploration.

7.4 SUGGESTIONS FOR FUTURE RESEARCH

To build upon the insights from this study, expanding the geographic scope to include a more diverse array of countries could illuminate both universal themes and distinct, region-specific challenges for retailing fashion design entrepreneurs and external support, enhancing the findings' applicability and depth. A longitudinal approach would be particularly valuable, capturing the dynamic and evolving nature of the retailing fashion designers over time, thereby providing insights into how entrepreneurs' needs for support and success factors shift in response to market trends and global economic changes.

A more thorough examination into the internal factors that contribute to the success of fashion design entrepreneurs, such as personal networks, innovation capabilities, educational background, and entrepreneurial mindset, could provide a more holistic view of the elements essential for institutions supporting retailing fashion design entrepreneurs. Bearing the diverse sectors in mind within the fashion retail market,

from luxury to sustainable brands, sector-specific studies could yield tailored insights relevant to each market segment's unique challenges and opportunities. Furthermore, it is advisable to conduct research on the external support needed by larger general retailers to compare these needs with those of retailing fashion design entrepreneurs, providing a clear distinction and direction for policymakers.

The increasing importance of omnichannel retailing and digital transformation within the retail industry presented another fruitful area for research. Understanding the specific implications of omnichannel retailing platforms and strategies on consumer behaviour and fashion business success could offer critical guidance for entrepreneurs navigating the particular marketplace. Accordingly, further research should explore additional contextual factors that may influence omnichannel preferences, helping to bridge any remaining gaps between theory and practice. Similarly, as consumer interest in slow fashion, sustainability, and ethical practices grows, exploring the integration of those practices into business models and their effect on consumer perceptions and company costs, could provide valuable insights for entrepreneurs aiming to align with those values.

Furthermore, an in-depth examination of policy and government support mechanisms across different countries could offer actionable recommendations for policymakers, identifying effective support models and areas for improvement. By addressing these diverse areas of future research, scholars could further elucidate the complexities of the fashion industry, contributing to developing robust support systems for fashion design entrepreneurs in retail worldwide and fostering an environment conducive to innovation, growth, and sustainability.

Over and above that, leveraging continuous data collection and analysis of consumer insights could enable entrepreneurs to stay abreast of evolving preferences and expectations. By using these insights to adapt and refine the retail mix, fashion design entrepreneurs could ensure their product offerings, strategies, and pricing models remain aligned with customer needs, enhancing satisfaction and driving success in the German and South African markets. Last, further research could delve deeper into the demographics, cultural, regional, and socioeconomic factors that shape consumer perceptions of slow fashion products, bridging any remaining gaps between theory

and practice. For instance, studies concentrating on the retail fashion needs or preferences of LSM 10 could be undertaken for the luxury market in South Africa. Conversely, in Germany, studies could be implemented on the retail fashion preferences of Baby Boomers and eminent fashion designers' needs in retail.

7.5 FINAL REFLECTIONS AND CONCLUSION

In reflecting upon the journey undertaken in this study, which explored the critical success factors and external support of retailing fashion design entrepreneurs in South Africa and Germany, it became clear that this research marked a significant step towards understanding the complexities and dynamism of fashion entrepreneurship within diverse market contexts. The comparative analysis between the two countries illuminated the interplay between economic and regulatory environments and their effect on the entrepreneurial success of fashion designers in retail, highlighting the importance of tailored strategies and support mechanisms that resonate with specific market needs.

This study's findings emphasised the pivotal roles of integrating sustainable product practices and embracing omnichannel technological advancements, while aiming for competitive or diverse pricing strategies to meet consumer expectations, specifically for retailing fashion design entrepreneurs. For external support entities, including government bodies, industry associations, and educational institutions, the research outlined a clear directive to provide specialised, context-sensitive support that addressed the unique challenges and opportunities facing retailing fashion design entrepreneurs.

The practical implications of this study offered a roadmap for retailing fashion designers and stakeholders to foster interconnectedness within the industry for continued growth, innovation, and sustainability. By enhancing access to financing, skill development, networking opportunities, and market entry support, alongside advocating for conducive policy environments, a tremendous opportunity existed to cultivate a thriving global retail industry for fashion design entrepreneurs that balanced creativity with commercial viability. Ultimately, government intervention in crafting research-driven support initiatives and sector-specific policies was crucial in both markets.

Looking towards the future, this study opened several avenues for further research, inviting scholars to investigate the evolving dynamics of the fashion retail industry more thoroughly, specifically for fashion designers, the impact of global market forces, and the effectiveness of different support mechanisms. Moreover, the identified gaps and future research directions offered fertile ground for academic exploration, inviting scholars to further investigate and evolve these theories in line with the changing global business environment. It could not be stressed enough that the ongoing dialogue between academic research and industry practice was crucial for adapting to the fast-paced changes in consumer behaviour, omnichannel technological advancements, and sustainability challenges that defined the modern fashion landscape.

In essence, the findings advocated for a strategic re-evaluation and enhancement of external support mechanisms, to more effectively align with and address the specific consumer needs critical to retailing fashion design entrepreneurs' success in South Africa and Germany. By bridging the identified gaps and leveraging collaborative, practical, and government-supported interventions, there lies a promising pathway towards nurturing a resilient, innovative, and thriving global retail industry for fashion designers.

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APPENDIX A: IREC ETHICAL CLEARANCE



4 July 2023

Ms B Poore
24 Hadedu Crescent
Rooihuiskraal Centurion
0154

Dear Ms Poore

Critical Success Factors and External Support of Retailing Fashion Design Entrepreneurs: A Comparison between Selected Areas in Germany and South Africa
Ethics Clearance Number: IREC 303/21

The DUT-Institutional Research Ethics Committee acknowledges receipt of your final data collection tools for review.

We are pleased to inform you that the data collection tools have been approved. Kindly ensure that participants used for the pilot study are not part of the main study.

Please note that **FULL APPROVAL** is granted to your research proposal. You may proceed with data collection.

Any adverse events [serious or minor] which occur in connection with this study and/or which may alter its ethical consideration must be reported to the DUT-IREC according to the DUT-IREC SOP's.

Please note that any deviations from the approved proposal require the approval of the DUT-IREC as outlined in the DUT-IREC SOP's.

It is compulsory for a student or researcher to apply for recertification on an annual basis. The failure to do so will result in withdrawal of ethics clearance. It is the responsibility of the researcher and the supervisor to apply for recertification.

Please note that you are required to submit a **Notification of Completion of Study** form together with an abstract to the **DUT-IREC** office on completion of your study.

Yours Sincerely

Prof J K Adam
Chairperson: DUT-IREC

APPENDIX B: GATEKEEPERS LETTER – CTFC

50 Harrington Street
Roomwork, 2nd Floor
The Harrington House
Zonnebloem
Cape Town
8000

2006/036071/08



Non-Profit Company

08 June 2023

To Whom It May Concern

RE: CAPE TOWN FASHION COUNCIL'S LETTER OF SUPPORT FOR BOITUMELO POOE'S RESEARCH PROJECT

As the Cape Town Fashion Council, we support Boitumelo Pooe's research study, which focuses on the critical success factors and external support of retailing fashion design entrepreneurs: a comparison between selected areas in Germany and South Africa.

As a supporting entity to fashion design entrepreneurs, we believe that this research study could potentially benefit this organisation by appropriately supporting independent fashion designers and could inversely benefit fashion designers aspiring to succeed in the clothing retail industry, thereby growing the South African fashion retail sector.

In return for supporting the proposed study, the Cape Town Fashion Council would appreciate firsthand access to the research findings to obtain in-depth insight into the study.

For further information regarding the Cape Town Fashion Council and its support of Boitumelo's research study, please get in touch with me using the details below.

Yours Faithfully

Acting CEO

Kerry-lee Bell

Cape Town Fashion Council

Kerry@ctfc.co.za

APPENDIX C: FINAL QUANTITATIVE SURVEY WITH CONSENT FORM & INFORMATION

English

Dear Respondent,

Thank you for taking part in our 5-7 minute survey on clothing and fashion. Please answer the questions in this survey as honestly and authentically as possible, based on your clothing and fashion purchasing behaviour and attitudes. There is no right or wrong answer. So don't think too long about your answers, but rather follow your first thought, which is usually correct.

By continuing with this study, I hereby confirm that I have enough information. I am aware that the results of the study, including personal details regarding my sex, age, date of birth and income will be anonymously processed into a study report.

The participants were aware that they could at any stage, without prejudice, withdraw their consent and participation in the study, as the study was generated online and was completely anonymous.

Agreement to Terms and Conditions (Consent)

☐

Please indicate the extend you agree or disagree with the following statements related to the place/s you prefer to purchase fashion								
		1 (Completely Disagree)	2	3	4	5	6	7 (Complete ly Agree)
Omnichannel Percieved Usefulness	1. Being able to use multiple channels (like the internet, shops or shopping apps) throughout the customer journey allows me to purchase fashion and clothing faster.	☐	☐	☐	☐	☐	☐	☐
	2. The opportunity to use different channels like the internet, shops or shopping apps while searching for and buying fashion and clothing <i>is useful for me</i> .	☐	☐	☐	☐	☐	☐	☐
	3. The opportunity to use different channels like the internet, shops or shopping apps while searching for and buying fashion and clothing <i>makes my life easier</i>	☐	☐	☐	☐	☐	☐	☐
Omnichannel Shopping Intention	4. In certain situations, I can imagine using different channels like the internet, physical shops or shopping apps that a fashion retailer offers me.	☐	☐	☐	☐	☐	☐	☐
	5. I would purchase fashion products from the retailers' website using my mobile phone if I cannot find the correct size or colour at the store.	☐	☐	☐	☐	☐	☐	☐
	6. I would search for the relevant information using my mobile phone while shopping for fashion at the store.	☐	☐	☐	☐	☐	☐	☐
Omnichannel Patronage Intention	7. I will continue to patronise retailers which offer both online and in-store services at the same time for fashion and clothing purchases.	☐	☐	☐	☐	☐	☐	☐
	8. I will recommend the use of retailers which offer both online and in-store services at the same time to others for fashion and clothing purchases.	☐	☐	☐	☐	☐	☐	☐
	9. I would like to use retailers which offer both online and in-store services at the same time in the future to purchase fashion and clothing.	☐	☐	☐	☐	☐	☐	☐
Please indicate the extend you agree or disagree with the following statements related to fashion products								
		1 (Completely Disagree)	2	3		5	6	7 (Complete ly Agree)
Authen ticity	10. I value fashion made by traditional techniques.	☐	☐	☐	☐	☐	☐	☐

	11. Craftsmanship is very important to me in fashion.	☐	☐	☐	☐	☐	☐	☐
	12. Handcrafted fashion are more valuable than mass-produced ones.	☐	☐	☐	☐	☐	☐	☐
Localism	13. I prefer buying fashion made locally to fashion manufactured overseas.	☐	☐	☐	☐	☐	☐	☐
	14. I believe fashion made of locally produced materials are more valuable.	☐	☐	☐	☐	☐	☐	☐
	15. We need to support locally made fashion brands.	☐	☐	☐	☐	☐	☐	☐
Exclusivity	16. Limited edition fashion holds special appeal for me.	☐	☐	☐	☐	☐	☐	☐
	17. I am very attracted to rare fashion products.	☐	☐	☐	☐	☐	☐	☐
	18. I enjoy having fashion products that others do not.	☐	☐	☐	☐	☐	☐	☐
Functionality	19. I often enjoy wearing the same fashion items in multiple ways.	☐	☐	☐	☐	☐	☐	☐
	20. I tend to keep fashion products as long as possible rather than discarding them quickly.	☐	☐	☐	☐	☐	☐	☐
	21. I prefer simple and classic designs.	☐	☐	☐	☐	☐	☐	☐
Equity	22. Fair compensation for fashion product producers is important to me.	☐	☐	☐	☐	☐	☐	☐
	23. I am concerned about fair trade or ethical labels when I buy fashion.	☐	☐	☐	☐	☐	☐	☐
	24. I am concerned about the working conditions of producers when I buy fashion.	☐	☐	☐	☐	☐	☐	☐
Please indicate the extend you agree or disagree with the following statements related to paying price premiums for fashion products								
		1 (Completely Disagree)	2	3	4	5	6	7 (Complete ly Agree)
Paying Price Premiums	25. Buying fashion products seems smart to me even if they cost more.	☐	☐	☐	☐	☐	☐	☐
	26. I would still buy fashion products that are important to me even if other brands reduced their prices.	☐	☐	☐	☐	☐	☐	☐
	27. I am ready to pay a higher price for fashion products that are important to me.	☐	☐	☐	☐	☐	☐	☐
Please indicate the extend you agree or disagree with the following statements related to fashion promotions								
		1 (Completely Disagree)	2	3	4	5	6	7 (Complete ly Agree)
Interest in General Fashion Advertising	28. Advertisements about fashion are of no concern to me.	☐	☐	☐	☐	☐	☐	☐
	29. I pay attention to advertisements about fashion (in general).	☐	☐	☐	☐	☐	☐	☐

	30. I become completely involved, absorbed or engrossed with advertisements about fashion.	☐	☐	☐	☐	☐	☐	☐
Social Media Usage	31. Social media networks are a good source to inspire my fashion purchases.	☐	☐	☐	☐	☐	☐	☐
	32. When I see fashion on social media networks I often <i>search for it online</i> to purchase.	☐	☐	☐	☐	☐	☐	☐
	33. When I see fashion on a social media networks I often <i>search for it offline</i> to buy it.	☐	☐	☐	☐	☐	☐	☐
	34. Sometimes I have seen fashion from one of my social media contacts and I have felt the impulse of buying it.	☐	☐	☐	☐	☐	☐	☐
	35. Sometimes I feel attracted to fashion shared by my social media contacts.	☐	☐	☐	☐	☐	☐	☐
Social Advertising	36. Social media adverts are a good source of fashion information.	☐	☐	☐	☐	☐	☐	☐
	37. Social media adverts provide updated information about fashion products.	☐	☐	☐	☐	☐	☐	☐
	38. Social media adverts are a convenient source of fashion information.	☐	☐	☐	☐	☐	☐	☐
<i>Please indicate the extend you agree or disagree with the following statements related to fashion presentation</i>								
		1 (Completely Disagree)	2	3	4	5	6	7 (Complete ly Agree)
Visual Merchandising (onsite)	39. An attractive store interior motivates me to buy fashion.	☐	☐	☐	☐	☐	☐	☐
	40. I feel compelled to buy fashion when I see an interesting window display.	☐	☐	☐	☐	☐	☐	☐
	41. I tend to be tempted by in-store displays to make unplanned fashion and clothing purchases.	☐	☐	☐	☐	☐	☐	☐
Online Visual Merchandising	42. An attractive online store motivates me to buy fashion.	☐	☐	☐	☐	☐	☐	☐
	43. I feel compelled to buy fashion when I see an interesting online store.	☐	☐	☐	☐	☐	☐	☐
	44. I tend to rely on how fashion is displayed online when I make decisions to purchase from an online store.	☐	☐	☐	☐	☐	☐	☐
<i>Please indicate the extend you agree or disagree with the following statements related to personal interactions in fashion stores</i>								
		1 (Completely Disagree)	2	3	4	5	6	7 (Complete ly Agree)
Personal Interaction	45. I like interacting with retail personnel when shopping for fashion.	☐	☐	☐	☐	☐	☐	☐
	46. Personal contact with retail personnel is important to me when I shop for fashion.	☐	☐	☐	☐	☐	☐	☐
	47. I like to talk with retail personnel when I shop for fashion.	☐	☐	☐	☐	☐	☐	☐

Please indicate your feelings about the different fashion retail functions. Note that in this section there are only 5 options. Starting with "1" being the most negative feeling...

		I dislike it that way (1)	I can live with it that way (2)	I am Neutral (3)	It must be that way (4)	I like it that way (5)
Kano Model Questions	48. Overall, how do you feel when you can shop for your fashion items from multiple retail channels during one shopping trip?	☐	☐	☐	☐	☐
	49. Overall, how do you feel when you cannot shop your fashion items from multiple channels during one shopping trip?	☐	☐	☐	☐	☐
	50. Overall, how do you feel when you can shop for fashion products from fashion designers in retail shops?	☐	☐	☐	☐	☐
	51. Overall, how do you feel when you cannot shop for fashion products from fashion designers in retail?	☐	☐	☐	☐	☐
	52. Overall, how do you feel when you pay price premiums for fashion designers products in retail?	☐	☐	☐	☐	☐
	53. Overall, how do you feel when you do not have to pay price premiums for fashion designers products in retail?	☐	☐	☐	☐	☐
	54. Overall, how do you feel when you become aware of a fashion promotion or marketing (e.g. advertising)?	☐	☐	☐	☐	☐
	55. Overall, how do you feel when you miss fashion promotion or marketing (e.g. advertising)?	☐	☐	☐	☐	☐
	56. Overall, how do you feel when you see a fashion display and presentations?	☐	☐	☐	☐	☐
	57. Overall, how do you feel when you do not see a fashion display and presentations?	☐	☐	☐	☐	☐
	58. Overall, how do you feel when you receive personal interaction from fashion retailer personnel?	☐	☐	☐	☐	☐
	59. Overall, how do you feel when you do not receive personal interaction from fashion retailer personnel?	☐	☐	☐	☐	☐
60. How old are you?	18- 24					
	25-34					
	35-49					
	50-64					
	65 and older					
61. What is the highest formal school leaving certificate you have?	No formal schooling					
	Some or all primary school completed					
	Some high school completed					
	Matriculation /high school leaving certificate					

	Technikon/technical diploma
	University degree
	Other post-degree
62. Are you ...	
	Male
	Female
	Diverse/Not specified
63. Into which category does your monthly household nett income (after tax) fit?	
	0-R8 000
	R8 001-18 000
	R18 001-37 000
	R37 001-63 000
	More than R63.000

Thank you for your help!

APPENDIX D: SAMPLE LETTER REQUESTING INTERVIEWS



RE: Request for Interview for Research

Dear "*Fashion Designer's Name*",

I'm writing to you as I'm currently working on a research project related to my PhD work with Ravensburg University of Cooperative Education in Germany, which is in partnership with Durban University of Technology – DUT. My research topic is looking into critical success factors of retailing fashion design entrepreneurs, such as yourself, and the structures required to support your businesses, specifically on the retail side.

I will be in Durban from the 08th - the 13th of August 2023, and during this time, I would really like to interview you for 45-60 minutes, as I believe your contribution would be highly valuable to this research and will help with the development of our industry.

The ultimate aim of the research is to find out what type of external support you require for increased success in retail and also find out your specific needs from external support to achieve that success. I can also assure you that as this is academic research, the data collected will adhere to the strictest confidentiality and anonymity rules and regulations.

Should you be interested and available for the interview, those rules and regulations will be underlined in the consent and information form I will provide. Thank you so much for taking the time to read this and for your consideration. For any further questions or comments, please do not hesitate to contact me via e-mail at <#> or through phone call <#> or via WhatsApp <#>.

Yours sincerely,

Name of Researcher
27.07.2023

APPENDIX E: LETTER OF INFORMATION WITH QUALITATIVE CONSENT FORM



LETTER OF INFORMATION

Title of the Research Study: Critical Success Factors and External Support of Retailing Fashion Design Entrepreneurs: A Comparison between Selected Areas in Germany and South Africa

Principal Researcher: Boitumelo Poee

Supervisor/s: Prof. Dr. Thomas Dobbelsstein, Prof. Veena Parboo Rawjee and Dr. Karen Corbishley

Brief Introduction and Purpose of the Study:

Greeting: Good day, thank you for your time today.

Introduction to participant: I am currently working towards my Management Sciences Ph.D. qualification within the Department of Marketing and Retail management in the Faculty of Management Sciences at the Durban University of Technology. At present I am located in Ravensburg Germany, as I work towards my PhD qualification and conduct various lectures at Baden-Württemberg Cooperative State University (DHBW-Ravensburg) while contributing towards various projects.

Invitation to the potential participant I would like to invite you to participate in this research. Your time and contribution will go a long way in reaching the objectives set out.

What is Research: Research is a systematic search or enquiry for generalized new knowledge.

By participating in this research you would be contributing towards the knowledge required to determine your needs from external supporters, in order to better meet the needs of you as a consumers, for improved consumer satisfaction and patronage when shopping for fashion. This research will assist you as fashion designers in retail to tailor your product offering and services according to consumer needs and preferences. Please feel free to ask me questions during this interview, as it is important to me that you feel as comfortable as possible about this study and that you understand the context of my questions. Please note that you are under no obligations to take part in this interview, but should you wish to continue a copy of this letter together with the consent form will be provided.

Outline of the Procedures: Overall, the aim of this study is to analyse the critical success factors of retailing fashion design entrepreneurs in Germany and South Africa and link them to the external support available to determine the most suitable resources, best practices and policies required to achieve success in retail. The objectives of this study are to serve you as a retailing fashion designer. Firstly,

consumer needs to patronise retailing fashion design entrepreneurs were identified through the distribution of surveys to consumers. Secondly, those needs were recognised and ranked as the critical success factors for your retailing needs as fashion design entrepreneurs. Now, the questions in this interview will assist in defining the types of external support required to meet those consumer needs associated with critical success factors and determine your needs as a retailing fashion designer from external support. All this information will be combined to ultimately propose appropriate external support resources, best practices and policies that will sustain the critical success factors for your business as a fashion designer. To facilitate the interview, semi-structured interview questions were constructed, for an in-depth discussion which is expected to take 45-60 minutes. The questionnaire will ask questions related to product offering, price ranges, personnel, presentation of ranges, location, promotion and finally a few details about external support. Participants' identities will be kept anonymous during the reporting process, thus, the responses will not be linked to you as an individuals.

Risks or Discomforts to the Respondents: There is absolutely no risk in participating in this interview, as none of the data provided will be linked to specific individuals.

Reason/s why the Respondents May Withdraw from the Study: There will be no adverse consequences for you as a respondent should you choose to withdraw, thus, as a respondent you are able to withdraw at any point before, during or even after the interview. Please be assured that the researcher will not terminate your participation and that your input will add great value to this research.

Benefits: This research will assist in identifying external support requirements and the structuring of external support policies for fashion design entrepreneurs, in order to better succeed in the retail industry. This research will be shared with various external support bodies for future developments.

Remuneration: There will be no remuneration or prizes offered to respondents.

Costs of the Study: No costs from the respondents will be incurred during this interview session.

Confidentiality: Respondents names will not be associated to their responses, thus the data provided will remain anonymous.

Results: Once the research is completed, examined and ready to be shared with the public, the researcher will forward all the respondents a copy of the published thesis, together with a link to all the corresponding journal articles. Should you wish to be kept updated regarding the development of the thesis please contact the researcher directly.

Research-related Injury: N/A

Storage of all interview recordings: The data collected will be transcribed and recorded. A softcopy of the transcriptions and the recordings will be saved as a folder by the researcher and accessible only to the researcher and supervisors for approximately 5 years after the collection of the data. Thereafter the data will be permanently deleted from the folder and the linked files.

Persons to Contact in the Event of Any Problems or Queries: Please contact the researcher + 49 (0)75118999 – 2102 or 22173846@dut4life.ac.za. Supervisor Dr. Karen Corbishley +27 83 633 2257 or the Institutional Research Ethics Administrator on 031 373 2375. Complaints can be reported to the Director: Research and Postgraduate Support Dr L Lingano on 031 373 2577 or researchdirector@dut.ac.za.



CONSENT

Statement of agreement to participate in the research study:

- I hereby confirm that I have been informed by the researcher, Ms Boitumelo Pooe, about the nature, conduct, benefits and risks of this study - Research Ethics Clearance Number: IREC 303/21,
- I have also received, read and understood the above written information (Participant Letter of Information) regarding the study.
- I am aware that the results of the study, including personal details regarding my sex, age, date of birth, initials and diagnosis will be anonymously processed into a study report.
- In view of the requirements of research, I agree that the data collected during this study can be processed in a computerised system by the researcher.
- I may, at any stage, without prejudice, withdraw my consent and participation in the study.
- I have had sufficient opportunity to ask questions and (of my own free will) declare myself prepared to participate in the study.
- I understand that significant new findings developed during the course of this research which may relate to my participation will be made available to me.

Full Name of Participant

Date & Time

Signature

I, _____ (*Name of Researcher*) herewith confirm that the above participant has been fully informed about the nature, conduct and risks of the above study.

APPENDIX F: QUESTIONNAIRE FOR RETAILING FASHION DESIGNERS

Place

Please think about the external support for your business operations...

1. Please tell me a little bit about the places you retail.
2. Do you currently have support related to your business operations or places you retail?
 - 2.1. Have you ever received such support before?
 - ☐ Yes
 - What type of support?
 - 2.1.1. Is it enough support for your business?
 - ☐ No
 - 2.1.2. Do you feel that you would need support related to retailing?
 - 2.1.3. What support would you ideally need in this area?
3. Do you currently operate as an omnichannel (*usage of multiple retail outlets at the same time...*) retailer?
 - ☐ Yes...
 - 3.1. What type of retail channels do you operate from?
 - 3.2. What type of external support is required for you to succeed further with omnichannel retailing?
 - ☐ No...
 - 2.1. Do you have a desire or intentions to operate as an omnichannel retailer?
 - 2.2. What external support would you need to operate as an omnichannel retailer?
4. Where are your retail stockists or stores located?
 - 4.1. Would you like to distribute from other locations?
 - ☐ Yes
 - 4.1.1. Where?
 - 4.1.2. What external support would you ideally require to reach that goal?
 - ☐ No
 - 3.1.1. Why?

Product

Please think about external support for your production/manufacturing and product offering...

5. Can you please tell me a little about your product?
6. Do you currently have support for your production/manufacturing?
 - 6.1. Have you received such support before?
 - ☐ Yes
 - 6.2. What type of support?
 - 6.3. Is it enough support for your business?
 - ☐ No
 - 6.4. Do you feel that you need support in this area?
 - 6.5. If you wish to have such support, what type would you need?
7. How would you categorise your products?
 - ☐ Authentic
 - ☐ Local
 - ☐ Exclusive
 - ☐ Functional
 - ☐ Equitable
- 7.1. Do you need any external support with the abovementioned ...
Why or why not?
8. What information do you usually receive about your product ranges from your stockist or retail stores?

- ☐ Sales Reports
 - ☐ Sales Forecast
 - ☐ Trend Forecast
- 8.1. Which product information is the **most** important to you from this list?

Price

Please consider external support for your pricing strategies and research/information related to your pricing...

9. Please tell me a little bit about your pricing strategy. How do you go about it?
10. Do you currently have support to price your product according to your business needs?
- 10.1. Have you received such support before?
- ☐ Yes
 - 10.2. What type of support?
 - 10.3. Is it enough support for your business?
 - ☐ No
 - 7.1. Do you feel you need support in this area?
 - 7.2. If you wish to have such support, what type would you need?
8. What is the price range of your product?
- From _____ to _____
9. Is there another price point you would like to offer?
- ☐ Yes
 - 9.1. What support would you need to be able to offer that price point?
 - ☐ No
 - 9.1. Why?

General (Standard Questions)

10. Where do you usually find out about external support available?
11. What external support have you applied and obtained for in the past?
12. Which external support have you applied for and NOT obtained for your business?
13. What are the challenges of obtaining and working with external support?
14. How has external support made a difference to your business?/ If not, why?
15. What would you like to see implemented with the current external support?
16. Should you receive financial support:
- 16.1. How much would you need?
 - 16.2. What is the most critical area within your retail business you would invest in?

APPENDIX G: SINGLE MEAN VALUES

Independent Variables		Overall (n=1043)		South Africa (n=511)		Germany (n=532)	
		Mean	Std. Dev	Mean	Std. Dev	Mean	Std. Dev
Omnichannel Preferences	Q1r1: Being able to use multiple channels (like the internet, shops or shopping apps) throughout the customer journey allows me to purchase fashion and clothing faster	5,373	1,759	6,061	1,381	4,712	1,829
	Q1r2: The opportunity to use different channels like the internet, shops or shopping apps while searching for and buying fashion and clothing is useful for me.	5,533	1,676	6,137	1,330	4,953	1,768
	Q1r3: The opportunity to use different channels like the internet, shops or shopping apps while searching for and buying fashion and clothing makes my life easier.	5,460	1,704	6,068	1,382	4,876	1,779
	Q1r4: In certain situations, I can imagine using different channels like the internet, physical shops or shopping apps that a fashion retailer offers me	5,342	1,649	5,933	1,370	4,774	1,695
	Q1r5: I would purchase fashion products from the retailers' website using my mobile phone if I cannot find the correct size or colour at the store	5,181	1,936	5,742	1,713	4,643	1,987
	Q1r6: I would search for the relevant information using my mobile phone while shopping for fashion at the store	4,771	2,022	5,681	1,661	3,897	1,951
	Q1r7: I will continue to patronise retailers which offer both online and in-store services at the same time for fashion and clothing purchases	4,635	1,981	5,288	1,919	4,008	1,833
	Q1r8: I will recommend the use of retailers which offer both online and in-store services at the same time to others for fashion and clothing purchases	5,083	1,885	6,151	1,292	4,058	1,795
	Q1r9: I would like to use retailers which offer both online and in-store services at the same time in the future to purchase fashion and clothing	5,395	1,645	6,219	1,184	4,603	1,637
Locality and Authenticity	Q2r1: I value fashion made by traditional techniques - Please indicate the extend you agree or disagree with the following statements related to fashion products	4,889	1,523	5,331	1,489	4,464	1,433
	Q2r2: Craftsmanship is very important to me in fashion - Please indicate the extend you agree or disagree with the following statements related to fashion products	5,179	1,486	5,597	1,415	4,778	1,443
	Q2r3: Handcrafted fashion are more valuable than mass-produced ones. - Please indicate the extend you agree or disagree with the following statements related to fashion products	5,321	1,505	5,325	1,584	5,318	1,426
	Q2r4: I prefer buying fashion made locally to fashion manufactured overseas - Please indicate the extend you agree or disagree with the following statements related to fashion products	4,588	1,641	4,753	1,679	4,429	1,590

	Q2r5: I believe fashion made of locally produced materials are more valuable - Please indicate the extend you agree or disagree with the following statements related to fashion products	4,811	1,585	4,834	1,683	4,789	1,486
	Q2r6: We need to support locally made fashion brands. - Please indicate the extend you agree or disagree with the following statements related to fashion products	5,576	1,464	6,063	1,288	5,109	1,471
Exclusivity	Q2r7: Limited edition fashion holds special appeal for me.	4,279	1,989	5,053	1,839	3,536	1,839
	Q2r8: I am very attracted to rare fashion products	4,302	2,053	5,217	1,893	3,423	1,803
	Q2r9: I enjoy having fashion products that others do not.	4,687	1,960	5,440	1,821	3,964	1,811
	Q2r10: I often enjoy wearing the same fashion items in multiple ways.	4,902	1,666	5,544	1,516	4,286	1,569
Functionality	Q2r11: I tend to keep fashion products as long as possible rather than discarding them quickly	6,016	1,287	6,112	1,256	5,925	1,310
	Q2r12: I prefer simple and classic designs	5,546	1,410	5,834	1,380	5,269	1,385
Equity	Q2r13: Fair compensation for fashion product producers is important to me	5,378	1,433	5,744	1,275	5,026	1,488
	Q2r14: I am concerned about fair trade or ethical labels when I buy fashion	4,668	1,733	5,204	1,627	4,154	1,676
	Q2r15: I am concerned about the working conditions of producers when I buy fashion	4,453	1,808	5,082	1,703	3,848	1,697
Price Premiums	Q3r1: Buying fashion products seems smart to me even if they cost more.	4,102	1,747	4,442	1,867	3,774	1,557
	Q3r2: I would still buy fashion products that are important to me even if other brands reduced their prices	4,533	1,755	5,039	1,795	4,047	1,569
	Q3r3: I am ready to pay a higher price for fashion products that are important to me	4,543	1,787	4,990	1,878	4,113	1,582
Promotional Presentation	RECODED Q4r1: Advertisements about fashion are of no concern to me	3,942	1,994	4,818	1,912	3,100	1,686
	Q4r10: Social media adverts provide updated information about fashion products	4,598	2,007	5,701	1,576	3,539	1,797
	Q4r11: Social media adverts are a convenient source of fashion information	4,605	1,996	5,663	1,545	3,588	1,848
	Q4r2: I pay attention to advertisements about fashion (in general)	3,966	2,085	5,123	1,868	2,855	1,628
	Q4r3: I become completely involved, absorbed or engrossed with advertisements about fashion	3,346	2,029	4,288	2,017	2,442	1,581
	Q4r4: Social media networks are a good source to inspire my fashion purchases	4,384	2,083	5,468	1,740	3,342	1,841
	Q4r5: When I see fashion on social media networks I often search for it online to purchase	4,033	2,133	5,082	1,950	3,024	1,790
	Q4r6: When I see fashion on a social media networks I often search for it offline to buy it	3,368	1,918	4,016	1,944	2,746	1,673

	Q4r7: Sometimes I have seen fashion from one of my social media contacts and I have felt the impulse of buying it	3,924	2,142	4,969	1,991	2,921	1,772
	Q4r8: Sometimes I feel attracted to fashion shared by my social media contacts	4,012	2,109	5,178	1,793	2,891	1,754
	Q4r9: Social media adverts are a good source of fashion information	4,497	2,072	5,626	1,654	3,412	1,842
	Q5r1: An attractive store interior motivates me to buy fashion -	5,020	1,672	5,746	1,429	4,323	1,591
	Q5r2: I feel compelled to buy fashion when I see an interesting window display	4,175	2,061	5,391	1,675	3,008	1,687
	Q5r3: I tend to be tempted by in-store displays to make unplanned fashion and clothing purchases	4,055	2,008	4,975	1,874	3,171	1,716
	Q5r4: An attractive online store motivates me to buy fashion	4,546	1,879	5,276	1,715	3,844	1,761
	Q5r5: I feel compelled to buy fashion when I see an interesting online store	3,815	2,129	5,002	1,916	2,675	1,645
	Q5r6: I tend to rely on how fashion is displayed online when I make decisions to purchase from an online store	4,113	1,952	4,849	1,902	3,406	1,726
Personal Interaction	Q6r1: I like interacting with retail personnel when shopping for fashion	4,278	1,933	5,023	1,787	3,562	1,794
	Q6r2: Personal contact with retail personnel is important to me when I shop for fashion	4,076	1,999	4,838	1,891	3,344	1,821
	Q6r3: I like to talk with retail personnel when I shop for fashion - Please indicate the extend you agree or disagree with the following statements related to personal interactions in fashion stores	4,114	2,027	4,908	1,899	3,352	1,847

APPENDIX H: REGRESSION ANALYSIS - MODEL SUMMARY & ANOVA

Variable	R	R Square	Adjusted R Square	Std. Error of the Estimate	Durbin-Watson
Omnichannel Preferences	1,000a	1,000	1,000	0,00000	1,401
Authentic Localism	1,000a	1,000	1,000	0,00000	1,629
Product Exclusivity	1,000a	1,000	1,000	0,00000	1,936
Product Functionality	1,000a	1,000	1,000	0,00000	1,588
Product Equity	1,000a	1,000	1,000	0,00000	1,444
Price Premiums	1,000a	1,000	1,000	0,00000	1,784
Promotional Presentation	1,000a	1,000	1,000	0,00000	1,939
Personal Interaction	1,000a	1,000	1,000	0,00000	1,971

Variable		Sum of Squares	df	Mean Square
Omnichannel Preferences	Regression	2180,674	9	242,297
	Residual	0,000	1033	0,000
	Total	2180,674	1042	
Authentic Localism	Regression	1344,765	6	224,128
	Residual	0,000	1036	0,000
	Total	1344,765	1042	
Product Exclusivity	Regression	2725,601	4	681,400
	Residual	0,000	1038	0,000
	Total	2725,601	1042	
Product Functionality	Regression	1279,690	2	639,845
	Residual	0,000	1040	0,000
	Total	1279,690	1042	
Product Equity	Regression	2164,083	3	721,361
	Residual	0,000	1039	0,000
	Total	2164,083	1042	
Price Premiums	Regression	2534,687	3	844,896
	Residual	0,000	1039	0,000
	Total	2534,687	1042	
Promotional Presentation	Regression	2770,707	16	173,169
	Residual	0,000	1026	0,000
	Total	2770,707	1042	
Personal Interaction	Regression	3755,297	3	1251,766
	Residual	0,000	1039	0,000
	Total	3755,297	1042	

APPENDIX I: TURN-IT-IN REPORT

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APPENDIX J: CERTIFICATE OF EDITING & AUTHENTICATION

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5 June 2024

To whom it may concern

CERTIFICATE OF EDITING & AUTHENTICATION

I have proofread and language edited the PhD dissertation titled:

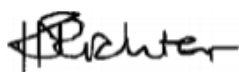
**“CRITICAL SUCCESS FACTORS AND EXTERNAL SUPPORT OF RETAILING FASHION
DESIGN ENTREPRENEURS: A COMPARISON BETWEEN SELECTED AREAS IN
GERMANY AND SOUTH AFRICA”**

by

Boitumelo Poee

To the best of my knowledge, the work is free of spelling, grammar, structural and stylistic errors
and the contents are certified as the author’s own work.

With thanks.



H. S. Richter

APPENDIX K: ABSTRACT FOR PUBLISHED CONFERENCE PAPER

Pooe, B. and Dobbstein, T. 2022. Insight into biases when measuring socioeconomics and demographics of consumers patronizing retailing fashion design entrepreneurs: Germany's perspective vs South African requirements. *CCBC 2022*, 189-200. Available: https://openscholar.dut.ac.za/bitstream/10321/4167/2/Proceedings_3-8440-8625-0_DOK.PDF#page=189 (Accessed 21 June 2024).

Insight Into Biases When Measuring Socioeconomics And Demographics Of Consumers Patronizing Retailing Fashion Design Entrepreneurs: Germany's Perspective Vs South African Requirements

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ABSTRACT

With an increasingly globalised market, it has become more pivotal to provide cross-cultural analytics of the different markets conducting international business. Thus, this paper aims to study demographic and socioeconomic variables inherent when conducting a cross-cultural analysis of consumer needs when patronising retailing fashion design entrepreneurs in Germany and South Africa. The primary problem was identified when the research team tried to match German and South African demographics and socioeconomic variables. A discrepancy in variables was recognised, delaying an appropriate cross-cultural analysis. Currently, fashion design entrepreneurs are becoming increasingly interested in the global market. Consequently, this research intends to provide information about consumer differences between one of the Southern African economies and one of the central European economies. Hence, this paper recognises that it does not need to compare "apples with apples" but instead acknowledges that cross-cultural analytics are still possible in different societies if similarities are not forced but rather acknowledged and appropriately managed. As a result, the diverse demographic and socioeconomic variables identified when conducting a cross-cultural analysis between German and South African consumers patronising fashion design entrepreneurs were scrutinised, and necessary recommendations were provided. Accordingly, the main question interrogated in this paper is that of demographic and socioeconomic differences between Germany and South Africa. Secondly, the question related to how bias can be avoided when comparing demographic and socioeconomic variables between Germany and South Africa is studied. Finally, the question connected to German consumers' characteristics and levels of patronage towards retailing fashion design entrepreneurs was addressed. The empirical data was collected through quantitative measures, through a survey and from 469 respondents in Germany. The findings indicated that construct, method and item biases all needed to be carefully considered for a cross-cultural analysis between Germany and South Africa. Secondly, the results revealed that the profile of consumers patronising retailing fashion design entrepreneurs in Germany as highly educated millennial females with an upper-middle-income living in metropolitan areas with no children. Finally, it was found that just over 10% of the population patronised retailing fashion design entrepreneurs in Germany.

Keywords: Biases, Cross-Cultural, Retailing, Fashion Designers, Entrepreneurship, Germany, South Africa

Factors influencing consumers' intended and actual sustainable purchases of clothing in Germany and South Africa

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Abstract: This paper aims to determine factors that influence consumers' intentions to purchase clothing sustainably, then determine factors that influence consumers' actual sustainable clothing purchases, and lastly, analyse the intention-behaviour gap of consumers when purchasing clothing sustainably. With a quantitative approach, an online survey was distributed in Germany (550) and South Africa (555) based on quota sampling. The independent variables analysed were the sustainability core-values of consumers, namely prioritisation, planning/habits, commitment/sacrifice and knowledge/information. Additionally, consumers' clothing preferences, such as exclusivity, functionality, price-insensitivity and aesthetics, were further independent variables. Dependent variables were the intentions and the actual sustainable purchases of clothing. Results indicated that sustainability core-values were the most significant factors impacting consumers' intentions and actual sustainable clothing purchases. Furthermore, the intention to purchase clothing sustainably was a vital factor influencing actual sustainable purchases. This was confirmed as the final outcome demonstrated a minimal intention-behaviour gap in both countries.

Keywords: clothing; fashion; sustainability; consumers; purchasing; intention-behaviour gap; Germany; South Africa.