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Unleashing the potential of the South African designer fashion sector

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Background: The global fashion industry is a key sector in the creative economy contributing to job creation and economic development. Increasingly, fashion design is identified as an important growth area for the African continent but remains an under-researched area.

Objectives: Firstly, this article seeks to position the South African fashion design industry within the global and African fashion industry. Secondly, a mapping of the spatial distribution of the industry is conducted to determine the potential of the industry to contribute to regional development. A case study analysis of South African fashion designers is also conducted.

Method: A mixed methods approach included constructing a database of 450 fashion designers and related institutions, which was analysed using geographic information system (GIS) mapping. Case studies of selected South African fashion designers were compiled. The study also included document and policy analysis.

Results: Analysis revealed that South African fashion designers are not only concentrated in large cities but also have a presence in smaller locations. While some designers are concerned about environmental sustainability, consumers are often more focused on low-cost, fast fashion items. Issues of intellectual property protection remain a concern for designers.

Conclusion: The designer fashion sector is a formidable sector of the South African fashion industry, but it faces several challenges that need to be addressed.

Contribution: This article brings to light the potential of the South African fashion design industry to contribute to growth and development in the post-pandemic era.

Keywords: creative industries; Africa; fast fashion; challenges; spatial distribution; innovation; designer fashion.

Introduction

The global fashion industry is estimated to be worth 1.7 trillion in total value and has great potential for sustainable growth and job creation (McKinsey 2023, McKinsey 2017). There is also growing recognition that fashion design is an important growth area for the African continent. A report by the African Development Bank (AfDB) showed that the apparel and footwear market in sub-Saharan Africa was worth US $31 billion (AfDB 2019). The South African fashion industry has growing significance in the economy establishing a key position in the creative economy. It has been identified as a strategic sector with particular potential to contribute to job creation (SME South Africa 2022).

Fashion also has important non-market cultural values: Cultural goods and services carry strong messages of heritage, identity and style and can be a powerful way to showcase the culture of the country and build up 'soft power' through cultural diplomacy (UNESCO 2022). Chang, Jason and Hui-Yu (2021) reflect on how creative industries create value through the combination of traditional iconography (which could be based on *traditional heritage*) with modern design elements to create a 'market for meaning'.

However, the fashion industry remains an under researched sector in the creative economy in general and in Africa in particular. While there has very definitely been a marked rise in the quality and quantity of research into the culture and creative industries (CCIs) globally, research into the fashion industry is still limited (England et al. 2021).

This article is based on some of the findings of a South African Cultural Observatory (SACO) 2023 scoping study on the fashion design sector in South Africa.

The contribution of the article is to identify the potential for the South African fashion design industry to contribute to growth and development in the post-COVID-19 era. Firstly, this is performed by putting the South African fashion design industry in context, globally and in Africa, with a special focus on issues of environmental sustainability. Secondly, a database of fashion designers and related institutions is compiled and geographically mapped to determine the size and spatial distribution of the sector and thus its potential for contributing to regional development. Thirdly, a case study analysis of South African fashion designers who have had some market success is conducted, to determine some of the challenges and opportunities facing them, with a view to making policy suggestions for the future development of the sector.

The article is structured as follows: Section 2 puts the South African fashion industry in global context. Section 3 provides an overview of the South African designer fashion sector. Section 4 discusses issues of fast fashion production and environmental sustainability; Section 5 presents the study research methods and data. Section 6 delves deeper into the characteristics of fashion designers in South Africa and presents an analysis of the spatial distribution of the sector. Section 7 provides a summary of existing policy. Section 8 identifies challenges and opportunities for South African fashion design, and Section 9 concludes.

The context of the fashion industry globally and in Africa

The creative economy, and the cultural and creative industries that make it up, has taken a more pivotal role in the economic growth and development of many regions worldwide (UNCTAD 2023).

There are many definitions of the cultural and creative industries and the creative economy (such as the UNESCO Framework,2009; World Intellectual Property Organisation copyright model, 2003; and the UNCTAD Classification of Creative Industries Model, 2008). They all generally refer to sectors that rely on creativity as an input to produce a good or service that has symbolic values (in the case of the cultural sector), or which result in the creation of intellectual property (in the case of creative industries). The SACO generally uses the UNESCO (2009) framework, which includes both cultural, often non-profit domains, such as Cultural and Natural Heritage, as well as more commercial applications, such as Design and Creative Services, which includes fashion design.

There is also growing recognition that fashion design is an important growth area for the African continent: A report by the African Development Bank showed that the apparel and footwear market in sub-Saharan Africa was worth US $31 billion (AfDB 2019). Afreximbank has launched the Creative Africa Nexus (CANEX) programme, which aims to facilitate investments in Africa's creative and cultural economy, including large programmes in the fashion and textile industries. The Economist (2021) identified the African fashion industry as one the 'five big stories to watch out for in 2022'.

However, the fashion industry was one of the industries that was most negatively affected by the coronavirus disease 2019 (COVID-19) pandemic as lockdown restrictions constrained the operations of the industry significantly, and the 2023 McKinsey report on the state of the fashion industry forecasted that a more difficult business environment is expected because of economic volatility, inflation and geopolitical uncertainty that could disrupt supply chains. However, post-pandemic, the fashion industry has continued to recover showing its resilience (McKinsey 2023). Despite income constraints as world GPD growth slows, luxury fashion sales are expected to grow faster than the rest of the clothing and apparel market (Mckinsey 2024).

Although it is a generally observed phenomenon that creative industries tend to cluster in urban areas and cities (Lazzerati et al. 2009), creative industries can also be important to small-town development (Abisuga, Oyekunle & Sirayi 2018; Drummond & Snowball 2019). Godart (2018) notes how the power dynamics of the fashion industry have changed: In the past, a few key fashion cities such as New York, London, Milan and Paris were the key centres of the industry. Zhang et al. (2022) argue that, in more recent times, the global dominance of a few large fashion cities or 'fashion capitals' is shifting to include more second-tier cities. As online work makes creatives more flexible in terms of location, creative producers may choose smaller cities and towns because of lifestyle attributes, 'soft' infrastructure and important cultural heritage links to identity (Kunda, Tjarve & Eglite 2021).

African fashion has become a more intrinsic part of the global fashion industry introducing the culture and heritage of the continent to a global audience increasingly enamoured by the uniqueness and novelty of a continent rapidly changing (Jennings 2015). The African fashion industry has seen increasing growth because of increased demand from the urban middle class and international buyers looking for authentic African fashion products (UNCTAD 2023).

The fashion design sector, like other parts of the creative industries, can also play an important role in contributing to job creation and economic development through production for the growing middle-class African market and internationally (Abisuga et al. 2018). Adinolfi, Tichaawa and Banda (2018) also point to fashion events as important contributors to local and international tourism. Thirty-two Fashion Weeks are held on the African continent yearly, and this signals the pivotal nature of the industry (UNCTAD 2023). Nigeria, for example, has a vibrant fashion industry and

Lagos Fashion Week is a key fashion platform showcasing African talent (African Development Bank 2019).

Sub-Saharan Africa is a growing centre of the clothing and fashion industry bringing designs fuelled by heritage and a more contemporary influence. A recent UNCTAD Report on African Fashion (2023) found that the market value for clothing and footwear in sub-Saharan Africa was word US$31 billion in 2020. Afreximbank launched the CANEX programme, which aims to facilitate and draw investments in Africa's creative and cultural economy including the fashion and textile industries. Fashionomics Africa, an initiative of the African Development Bank, has provided a platform for marketing fashion and textiles (AfDB 2019).

African fashion producers are being recognised as important cultural entrepreneurs, who can contribute to economic development and job creation, especially for young people (England et al. 2021; Langevang 2017). Intellectual property rights play a crucial role in safeguarding designers, and this is an area that some African designers have not engaged with adequately. The lack of focus on intellectual property rights has not been beneficial to the sector but has been a setback and impediment. A 2014 study of CCIs in Cape Town revealed that few creative firms had formal copyright instruments to protect their intellectual property (Snowball, Tarentaal & Sapsed 2021). To take advantage of growing local markets and enhanced digital technologies, such e-commerce platforms that facilitate reaching global markets, African designers need to be able to protect and monetise their designs.

Online shopping rose in popularity in the COVID-19 era. Fashion designers have leveraged digital platforms to promote their brands and interact with their customers (Casciani, Chkanikova & Pal 2022). A study investigating how fashion brands use social media revealed that online sales and social media platforms increased by 40% during the COVID-19 pandemic (Mahmoud et al. 2022). According to UNESCO, ecommerce penetration in Africa increased from 13% in 2017 to 28% in 2021 (UNCTAD 2023). Within the digital space, issues of the protection of intellectual property rights become a more crucial consideration.

The South African fashion design sector

The fortunes of South Africa's fashion industry have changed over the years, from a present that has potential and has seen some success especially on the continent to a past where it was heavily protected and thrived in an insular environment. The removal of import tariffs and other protection in Post-apartheid the South Africa resulted in increased competition, which led to a rapid decline in output and employment in the sector (Rogerson 2006).

Morris and Barnes (2014) provide insight into the changes that have occurred in the South African fashion industry post-apartheid:

> Until the mid-1990s the garment and textile sector was locked into import substituting industrialisation with firms protected by an almost impenetrable thicket of targeted import quotas and high, product specific tariffs. In 1994 the government initiated a radical garment tariff phase down agreement which saw the elimination of import quotas, a movement to a more uniform tariff structure and a major reduction in nominal tariffs. By 2001, tariffs on textiles were down to 28% and tariffs on garments down to 40%. (p. 9)

The fashion design sector in South Africa has emerged more distinctly in the post-apartheid era (that is, after the advent of democracy in 1994) and continues to be a sector developing particular characteristics. Within the creative and cultural industries, the fashion design sector is a formidable sector exhibiting key trends. A 2022 SACO Cultural Mapping Study showed that more cultural and creative industries activity was seen in the Western Cape, KwaZulu Natal and Gauteng. Gauteng emerged as a key node for the creative industries at 46,5% of the creative economy's contribution to gross domestic product (GDP). Langevang (2017) notes that the clustering of the fashion industry is seen globally and in South Africa.

The African Development Bank (2019) report identifies South Africa as a leading fashion exporter in the African context and is identified as a country placing a key focus on local and international exports in the sector. The vibrant creativity of the South African fashion industry sets apart the industry within the creative economy, and it is increasingly reaching global markets.

The growing global recognition of the importance of the CCIs has been beneficial to the fashion industry. According to SME South Africa, the clothing, textiles, footwear and leather (CTFL) industry is important to the economy of South Africa representing 14% of manufacturing employment in the country and providing an estimated 60 000 to 80 000 jobs (SME South Africa 2022). Textiles are South Africa's eleventh largest manufactured goods export.

As local recognition of the creative economy increases the South African fashion industry is looking forward to increased growth and prominence. The trajectory of the fashion industry in South Africa has seen the industry stand out as one of the key industries in the creative economy in many ways. It has, however, struggled to compete effectively on the international market post-apartheid, when South Africa joined the World Trade Organisation and reduced the level of protection offered to the local clothing and textile industries, particularly with the influx of cheap fashion imports (DTIC 2020). From large fashion retailers dominating the market, smaller boutique-style shops are becoming more prevalent and have led to the closure of leading fashion retailers while others are struggling.

Small-scale designers have brought a unique dimension very evidently. Designers like Thula Sindi, David Tlale, Palesa Mokubung and Jacques van der Watt are breaking barriers showcasing at international events and growing strong brands. A uniquely innovative design artistry has brought creative impact and a powerful brand identity and meaning. Bold designs crisscrossing modernity and tradition have ushered in a fresh design focus.

A report commissioned by the Department of Trade and Industry revealed key insights on the fashion design sector in South Africa (DTIC 2020). It was estimated that the sector contributed R1 billion a year to the South African economy. The report also noted that there was a faster growth in designer fashion from 2009 to 2014 compared to clothing and footwear in general. The report (DTIC 2020) collected data from 300 designers revealing key characteristics of South African fashion design firms. Findings showed that most fashion design labels in South Africa are young firms (nearly a quarter were less than 3 years old) and small (92% had turnover of less than R5 million a year). Notably, nearly 30% of designers do their own manufacturing, and markets for the designer's wares are mostly local. The report also stressed the problems in competing with cheap illegal imports faced by fashion designers (DTIC 2020).

While there have been many worthy initiatives to promote and catalyse the designer fashion sector, they remain limited. A keen strategic and policy focus on the sector is necessary to build and develop a designer fashion sector that is resistant and that can contribute more significantly to the economic growth.

While the South African fashion design sector has shown evident growth, it has faced a number of challenges that have impeded growth. One of the most widely publicised development challenges of the sector is sustainability, particularly environmental damage caused by 'fast fashion'.

Fast fashion and the rising importance of sustainability in the fashion industry

The fashion industry has been identified as a key polluter of the environment, and its adverse impact on the environment has been widely documented. Waste management is a key concern in the fast fashion industry, which has led to a rising focus on the industry as regards its sustainability practices (Shen 2014). According to the Boston Consulting Group Pulse of the Fashion Industry report (2018), 52% of fashion industry executives polled said sustainability targets were a key guiding principle for strategic decision-making.

'Fast fashion' is a relatively recent phenomenon and describes a production and consumption process that is designed to produce clothing with as short and cheap a production cycle as possible (Zanjirani, Asgari & Van Wassenhove 2022). The assumption is that consumers will frequently discard fast fashion items (early disposal) in favour of the purchase of new styles. Producers thus do not prioritise quality or durability of such items (Abbate et al. 2023; Dissanayake & Weerasinghe 2022; Zanjirani et al. 2022). In the European Union, clothing consumption increased by 40% between 1996 and 2012 and the average number of times that each garment was worn has fallen (Zanjirani et al. 2022).

'Fast' describes how quickly retailers can move designs from the catwalk to stores keeping pace with the constant demand by consumers for more and different styles (Bick, Halsey & Ekenga 2018). Fast fashion has become a thriving business model (Bick et al. 2018). Consumers seeking lower priced clothing have been the driver of the fast fashion industry. Cheap fashion imports particularly from the east have flooded markets, negatively impacting fashion retailers not focused on fast fashion. The focus in the 'slow fashion' movement is creating longer lasting and durable garments with a keen quality focus and with less likelihood of being replaced seasonally reducing waste and promoting a culture that embraces garment longevity. Drivers for adopting more sustainable production methods in fashion can come from both the supply and demand-sides. On the supply side, firms (producers and individual designers) may regard it as part of their corporate social responsibility (CSR) to reduce resource use and pollution that are linked to climate change. On the demand-side, customers and other stakeholders are becoming more environmentally aware and may increasingly demand that firms take into account the environmental impact of their products (Abbate et al. 2023; Grace Gatawa 2022). Njeru (2023) describes the eco-fashion or slow fashion, movement as a shift from quantity to quality.

A problem with fast fashion is that consumers will dispose of fashion items quickly leading to waste challenges (Abbate et al. 2023). The fast fashion industry generates huge amounts of waste and production processes are particularly polluting (Dissanayake & Weerasinghe 2022). As observed by Bick et al. (2018):

> [*I*]n the two decades since the fast fashion business model became the norm for big name fashion brands, increased demand for large amounts of inexpensive clothing has resulted in environmental and social degradation along each step of the supply chain. (p. 4)

Global material (fabric) consumption is expected to increase to 167 Gt in 2060, from 79 Gt in 2011 (Dissanayake & Weerasinghe 2022), causing an increasingly large negative environmental impact from the industry if current supply chain, production methods and consumption trends continue. Globally, at present, less than 1% of all textiles are recycled back into clothes, and 75% are disposed of in landfill sites (Abbate et al. 2023).

A proposed solution to the problem is the move away from a linear economy to a circular economy. The idea of the circular economy is that resources are re-used and recycled through the production and consumption process, thus reducing both pollution and resource use. The circular economy requires a change in business models, so that they include the recovery and reuse of materials used in production and consumption when the product reaches end-of-life (and is no longer wanted by the original consumer). Circular fashion involves changing each stage of production, from the materials used, the way items are designed and the way they are consumed (Dissanayake & Weerasinghe 2022).

The importance of the design process in impacting sustainability has also been observed: Dissanayake and Weerasinghe (2022) contend that more than 80% of the environmental impact of fashion is dependent on the design process: 'Designers have the power to select materials, trims, silhouette, colours, quality, and their choices significantly determine the environmental impact of the product'.

While sustainability has been hailed as important in the fashion industry, there are challenges in the adoption of a circular economy in the fashion sector. The long and complex supply chains associated with clothing production makes it difficult to trace production processes as well as environmental impact (Abbate et al. 2023). While various forms of recycling can help to improve environmental sustainability, managing recycling processes is often problematic as firms often lack the requisite infrastructure, expertise and resources (Farahani, Asgari & Van Wassenhoven 2022).

The second-hand clothing market may also help to reduce environmental impact and is a growing segment of the fashion industry. Fashion discarded in the more developed regions of the world is finding a market in the global south. A recent UNCTAD report on the African Fashion sector (2023) found that in 2019 Africa accounted for a third of the global imports of second-hand clothes (worth US$5 billion). While the proliferation of second-hand clothing can reduce waste, it has also been criticised as 'dumping' (Farahani et al. 2022), and the question of the quality of these clothes has been raised. Clothing donations, sold cheaply in local markets, can make it very difficult for African fashion designers to compete and establish their own businesses. In addition, African fashion designers are already following sustainable practices, as they are used to, for example, using local textiles, upcycling and reusing garments and trimmings and reducing waste.

An additional issue is that while fashion designers may have great interest in producing more responsibly sourced and durable 'slow fashion', consumers may not have the resources, or interest in, paying for such items. As observed by Gatawa (2022) sustainability issues in the fashion industry have risen to the fore, but there remains a wide gap between the importance placed by designers on environmental impacts and the emphasis placed by consumers. Dissanayake and Weerasinghe (2022) corroborate this view arguing that globally, the rise in fast fashion is being driven by the increasing number of middle-class consumers who have disposable income to spend on clothing, but who may not yet be willing, or able, to pay higher prices for sustainably produced garments, focusing on purchasing cheaper fashion products (Bick et al. 2018).

Gatawa (2022) contends that the mismatch between the sustainability concerns of designers and consumers may also be attributed to a lack of awareness about the importance of environmental issues among South Africans:

> My assertion is that there remains a gap in the awareness and knowledge of environmental issues in South Africa and the decision to base clothing decisions on environmental protection… The awareness of environmental issues has also not translated into visible action across all demographic profiles, and especially the lower end of the LSM [Living Standard Measures] groupings in South Africa. (Gatawa 2022:97)

While there has been a rise in concern among some South African young designers who aim to address these issues through social activism (DTIC 2020), a recent large-scale quantitative study (Muposhi, Nyagadza & Mafini 2023) showed that most fashion designers in South Africa 'are yet to fully accept responsibility related to adoption of sustainable fashion'.

Research methods and data

The study took a mixed methods approach, including document analysis, case studies and spatial analysis using GIS mapping. An extensive review of secondary data sources was conducted to identify key areas of challenge and opportunity in the global and African fashion industry. Sources included a review of academic journal articles, industry reports and online publications and policy documents. International industry reports included various editions of the McKinsey 'The State of Fashion' report; a recent (2023) report by UNCTAD entitled, *The African Fashion Sector: Trends, Challenges and Opportunities for Growth*, a report by the AfDB on the fashion sector and information on the Afreximbank (CANEX 2023) programme.

Documents relating specifically to South Africa, included the SACO Cultural and Creative Industries Mapping Study (SACO 2022); the Department of Sport, Arts and Culture (DSAC) National Design Strategy (2019), A pre-COVID report commissioned by the national Department of Trade, Industry and Competition (DTIC 2020), entitled, *Assessing the Economic Value of the Designer Fashion Sector in South Africa*, The Revised White Paper on Arts and Culture (2017); the Creative Industry Masterplan (2022); The National Design Strategy, (2019) and information from regional bodies (Provincial Fashion Councils).

For the case study analysis, eight South African fashion designers were selected. They were selected for variety, and based on their special focus, for example, Loxion Kulca is an established designer; Thando Ntuli is a successful young designer; Lukhanyo Mdingi has a special focus on ethical and sustainable fashion and Nkhensani Nkosi is an example of an initially successful designer label (Black Cherrie), but whose label lost ground later on. As the research method was based on publicly available secondary sources, designers with some media presence were chosen. With reference to the industry challenges and opportunities identified through the review of secondary sources, the case studies were then analysed.

Using web searches, business directories and industry networks, a database of 450 South African fashion designers and related associations was constructed. Web searches included industry portals and marketing sites (e.g., SA Fashion Week; Craft and Design Institute; Conscious Fashion Collective, Iqoqo; Peek), the online yellow pages, media reports (from online sources such as Culture Trip, Twyg), retail portals (Young Designers' Emporium; Orphan Street Clothing Shop; and DuckDuckGoose store) and exhibition catalogues (such as the *Fashions of Southern Africa exhibition,* Kent State University Museum).

The database consisted of 85.3% fashion designers, but it also includes a small number of fashion design-related institutions, such as those involved in Education and Training (fashion schools and colleges, sometimes linked to universities), fashion media (fashion blogger, magazines, fashion photographers), industry organisations (such as fashion and design councils; fashion industry event organisers; fashion industry institutes) and specialist manufacturers, specifically offering production services for designers. These were included in order to give an indication of the fashion design ecosystem in South Africa. Geographic information systems mapping was then used to analyse the data.

Unravelling the characteristics of fashion designers in South Africa

The case study analysis showed that there were key similarities in a number of areas relating to the business development and characteristics of the selected designers. For instance, many of the designers based their businesses in urban areas, choosing prominent locations rather than small towns, although their source of inspiration was often derived from rural cultural influences and heritage.

The designers selected for case study had high levels of human capital; all had higher education qualifications some of which were in fashion design. Some of the designers had also benefited from industry development initiatives, such as the Department of Sports, Arts and Culture emerging creative programme. The increasing number of fashion design schools have helped train and develop a crop of designers across South Africa, providing them with the practical business skills needed to start their own brands.

Most of the designers mentioned their commitment to becoming more sustainable and outlined some of the methods they currently utilise or plan on utilising in the future. The designers had varying approaches to sustainability, for example, Thebe Magugu incorporated discarded garments into his 2023 collection. Rich Mnisi emphasises his commitment to environmentally sustainable practices that also uplift the local community. Some of the materials he uses are sourced from local mills, and he often uses surplus fabrics from local suppliers. While he does work with a few small factories, he states that he only works with those who are transparent about their practices and ensure fair working conditions. Lukhanyo Mdingi goes to great lengths to ensure that the fabrics used in the production of his designs are as sustainable as possible. His collection entitled 'Perennial' used high-quality materials such as pure Angora Kid Mohair and Merino wool, all sourced locally, as well as other natural fibres such as silks and linen. He stated that throughout the creation of the garments for this collection, he worked closely with his sources and the local artisans in the Eastern Cape.

However, a focus on environmental sustainability comes with a cost and some smaller designers commented that sourcing high-quality local materials is often more challenging and expensive than the lower quality imports. They may not always have the time or money to donate to sustainability-focused foundations yet, as they are still trying to get their brand off the ground.

While the case studies revealed that designers were thriving and building strong brands, it was also shown that they faced several challenges. A key challenge is access to finance in the startup and expansion phases of their business and this limited how they could grow and develop their businesses as well as grow strong brands. Many of the designers had the desire to expand globally and to showcase at premier global fashion events.

Initial success also does not guarantee financial sustainability. Stoned Cherrie, a fashion brand that was one of the earliest to emerge from young designers in post-apartheid South Africa, was initially very successful becoming a leading South African fashion brand. It achieved initial success but later faced difficulties floundering as it became increasingly disconnected from its customers. The brand had shown immense potential to become a leading brand but failed to advance sustainably in the fast moving fashion environment.

Spatial analysis of fashion design in South Africa

Spatial analysis performed as part of the SACO Mapping Study (2022) showed that provinces with larger metropolitan areas (Western Cape, KwaZulu-Natal, and Gauteng) hosted more cultural and creative industrial activity and contributed more in terms of Gross Value Added than provinces in more rural areas and with smaller cities and towns. Gauteng-based CCIs, for example, produced nearly half (46.5%) of the creative economy's contribution to the GDP of South Africa. Cultural employment follows the same spatial pattern. Langevang (2017) confirms that the fashion industry clustering is a global phenomenon, and in Africa, fashion hubs are located mostly in large urban areas including Lagos, Johannesburg and Cape Town. However, he also observes that other large cities on the continents can still host fashion clusters.

In a study of Canadian fashion designers' decisions of where to locate Brydges and Hracs (2019) suggest three forms of mobility that could mean that designers do not need to be permanently based in large cities. (1) Temporary mobility refers to designers moving between smaller towns and larger cities for special events, such as fashion weeks, and industry meetings; (2) Mediated mobility is when designers are based in smaller centres, but work with intermediaries (such as marketing and sales managers) who are based in larger cities and (3) Virtual mobility that uses the internet and social media to allow designers-based outside large centres to interact with clients and suppliers and promote and sell their products without having to be physically based in the city. In the Canadian study, some fashion designers deliberately opted out of large cities and made mid-sized cities, which were more livable and less competitive, their home base (Brydges & Hracs 2019).

Analysis of the fashion ecosystem in South Africa constructed for this study showed that, as expected, fashion designers and related institutions were clustered in provinces with the largest cities: Gauteng, 29% and the Western Cape, 33% (see Table 1). These provinces were surprisingly dominant, while KwaZulu-Natal, which hosts a Fashion Design Council and where there has been some regional policy intervention for the sector, was home to a much smaller cluster than expected. While this may be because of the way in which the database was constructed (as described in the Methods), it would be an interesting area for future research.

Closer analysis of clusters in cities and towns showed that while fashion designer businesses were generally concentrated in the two main hubs (Cape Town, 28% and Johannesburg/Pretoria, 24%), second-tier cities in more rural provinces had small clusters (Gqeberha in the Eastern Cape, 5%; Thohoyandou in Limpopo, 4%).

This spatial distribution is a potentially interesting finding: Provinces with big cities tended to have much higher percentage of fashion designers in that one city. For example, 89.4% of fashion designers in the Western Cape are based in the province's largest city (Cape Town), while only 48.5% of fashion designers in the Eastern Cape are based in that province's largest city (Gqeberha), perhaps offering the opportunity for more evenly spread spatial development in these provinces (see Table 2 and Figure 1).

Implications of the findings are that, although the fashion design industry is concentrated in South Africa's largest cities, there may be support for the theories of Kunda et al. (2021) and Zhang et al. (2022), which suggest that smaller towns and secondary cities can provide opportunities for fashions designers to develop and grow their brands.

TABLE 1: Fashion designers and related institutions by province.

Province	Frequency	%
Eastern Cape	39	8.67
Free State	22	4.89
Gauteng	131	29.11
KwaZulu-Natal	37	8.22
Limpopo	36	8.00
Mpumalanga	16	3.56
North West	13	2.89
Northern Cape	8	1.78
Western Cape	148	32.89
Total	**450**	**100.00**

Case study analysis of a sample of designers showed that, even when their businesses are based in cities, designers often attributed their inspiration to traditional cultural heritage influences that were often connected to rural areas. There is also some indication that designers are making use of different forms of mobility (temporary, mediated and virtual), so that they do not have to be based in larger cities fulltime.

Creative industries policy in South Africa

There are also several policies focusing on the creative economy in South Africa in place. These include national level policies such as the Revised White Paper on Arts and Culture (2017) and the Creative Industry Masterplan (2022). There are also specific policies such as the National Design Strategy (2019) and regional bodies such as provincial fashion councils. The fashion councils include the Cape Town Fashion Council, the KwaZulu-Natal Fashion Council and the Gauteng Fashion Council. The councils have clear mandates and are registered non-governmental organizations (NGOs). Local-level policies to promote the fashion industry in some municipalities such as eThekwini have also been crafted. Pather (2015) makes a strong case for an integrated industrial development strategy for greater coordination and organisation of the sector.

Within the leading fashion cities in South Africa, there have also been attempts to develop clusters or districts (Johannesburg Development Agency 2004). Fashion districts internationally are a key node for the industry drawing consumers and demarcating defined precincts for the industry (Cachalia, Jocum & Rogerson 2004). Clustering has been a key part of local economic development (LED) strategy and industrial development (Flew 2002). In South Africa in the inner city of Johannesburg, the Johannesburg Fashion District has been developed as a hub for the industry in the city (Johannesburg Development Agency 2004). It was built and developed as a key location for design, manufacturing, sales and supply components of the sector in

TABLE 2: Percentage of fashion designers based in the largest city in each province.

Metro or city	Cluster by province (%)	Cluster in country (%)
Cape Town	89.39	26.22
Johannesburg	70.19	16.22
Durban	79.31	5.11
Pretoria	16.35	3.78
Gqeberha	48.48	3.56
Polokwane	43.75	3.11
Bloemfontein	63.16	2.67
Buffalo City	18.18	1.33
Kimberly	62.50	1.11
Mahikeng	45.45	1.11
Mbombela	18.75	0.67

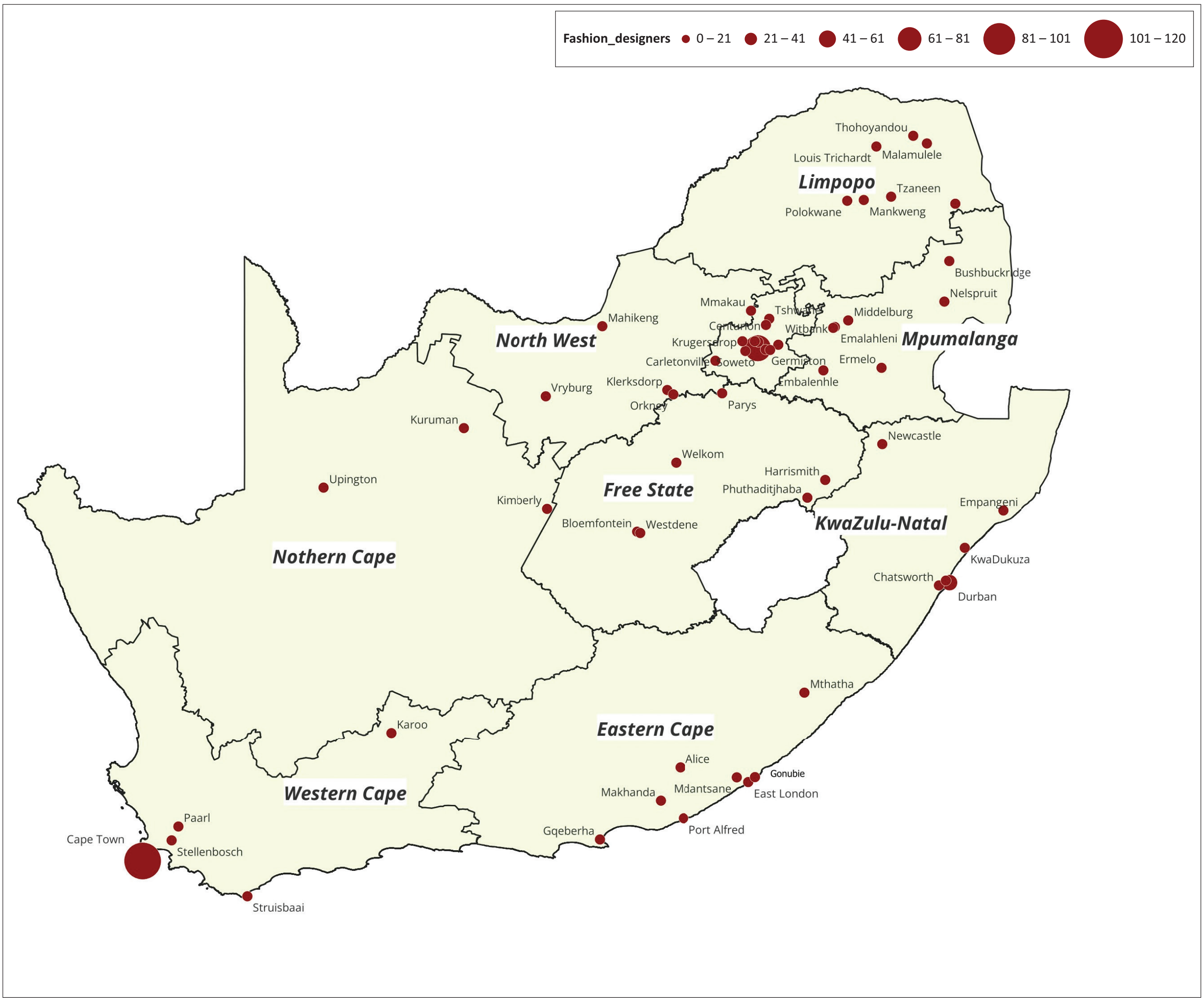

FIGURE 1: Map of the size of clusters of fashion designers in South Africa by city.

post-apartheid South Africa and has been in existence for some time (Rogerson 2006). The fashion district was part of a larger urban regeneration strategy in the inner city aimed at revitalising and rejuvenating the inner city. The district was developed as a key element of the 2030 Vision for the city of Johannesburg.

While the district has not achieved its full potential, it continues to exist. A study by Mpati (2022) estimated that the district was home to more than 1000 fashion-related enterprises. The Johannesburg Fashion District has, however, faced an exodus of designers to other locations within the city as designers were increasingly finding it difficult to operate sustainably in this district. Mpati's study (2022) not only identified the potential of the Johannesburg Fashion District particularly for economic development and job creation but also identified the challenges faced by SMEs such as the difficulty in sourcing materials and the high cost of labour and drew attention to the limited budgets available for development in the industry. Challenges in the district align with challenges faced by SMEs more broadly. The failure of the city to support and engage with businesses was seen as a key challenge in the district that may have inhibited the growth of the district.

Challenges and opportunities in the fashion design sector

The fashion design sector has been constrained by challenges that have impeded growth and are significant hurdles in the quest to build resilient fashion brands, but opportunities also exist.

A key challenge is that there is need to improve productivity and quality. Training is often limited particularly in African countries. Many African universities do not provide the requisite business and marketing skills for designers who are needed to develop successful and sustainable businesses. The DSAC National Design Strategy (2019) also identifies the lack of business and marketing skills in the sector.

Market demand is often volatile in the fashion industry and requires fashion designers to be innovative and to take risks (Moloi & Nkahle-Rapita 2014). Local markets are often available but can often be constrained and competitive particularly with the influx of cheaper fast fashion products diverting consumers from locally made fashion products. International markets also exist, but competition is intense and breaking into these markets can be difficult. The development of the African Continental Free Trade Area, with the associated Pan-African Payment and Settlement System, should also help to improve the efficiency and security of international payments (UNCTAD 2023).

There are opportunities in the industry that offset some of the challenges such as the opportunity to increase productivity through training (England et al. 2021) and the lower cost of labour than in the global north. There is also scope for expanding into local and regional markets. Building a strong and resilient fashion brand also presents opportunities to position the African designer brand as a key player in the world market. Increased government support will aid in the growth and development of fashion design brands. The increased technological developments such as social media, ecommerce and other online platforms provide access to markets for designers (Forbes 2022).

Conclusion

Globally, the fashion industry is distinctly emerging as an industry contributing to the global economy. The impetus and innovative focus of the global fashion industry are seen in the multiplicity of fashion events that illuminate the developments in the industry. Against the headwinds of adversity, the global fashion industry continues to grow. The African fashion industry is booming and as it becomes more internationally driven and focused, it is infusing growth and dynamism to the industry. Across all regions of Africa, the fashion industry is growing in a way that has garnered global interest. No longer are African fashion designers seen as a periphery segment of the fashion industry as their influence has brought a unique African flavour to the industry. Creativity is a hallmark of the African fashion industry, and this is infused into designs that are both dynamic and tangibly competitive.

The South African designer fashion industry is an increasingly important sector of the global fashion industry poised for growth in the post-pandemic era. Innovation excellence and design savvy have brought a design aesthetic that has global appeal. While the pandemic was difficult for the South African fashion industry, the industry had shown resilience rebounding successfully. Across South Africa the designer fashion sector has become a key player in the fashion industry. The increasingly global profile of the industry is evident with fashion designers showcasing at premier fashion events. Post-apartheid, the fashion industry in South Africa has faced competition and has had to work harder to attract customers and compete in a globalised world.

A defined spatial formation of fashion designers within South Africa has revealed that designers are concentrated in urban centres and that Johannesburg and Cape Town are key fashion cities, but designers often start in smaller cities and can be based there more readily as digital marketing and business management can increasingly be done online. Fashion design could thus be one of the creative economy sectors that can facilitate more balanced regional development.

There are not only real challenges and impediments in the South African fashion industry but also key opportunities.

Market access is a key challenge as well as the ability to compete internationally in a globalised world. In a cutthroat industry, the fashion industry has had to aggressively find ways to compete often floundering and finding it difficult to compete. The influx of cheap imports in the industry particularly from the east has impacted the industry posing a real challenge to the industry. Fast fashion has become a key challenge with consumers opting to buy cheap clothing and moving away from durable and higher quality clothing. While the fast fashion movement has been the definitive trend in the industry the slow fashion trend has also risen as an antithesis of fast fashion attracting designers focusing on producing quality apparel while minimising environmental impact. The emphasis in the slow fashion movement is to create garments that are made in a slow and considered manner paying attention to quality, longevity and durability.

The South African fashion industry has faced many challenges but opportunities to expand into global markets exist as well as cementing growing local markets. The importance of creating a favourable policy environment for the fashion industry to thrive has been raised. Policy coordination and targeted strategies are necessary as well as the development of fashion specific strategies. Intellectual property rights protection is also an area that needs urgent attention particularly as the industry continues to expand into international markets.

Sustainability while it is now on the radar of fashion designers needs to be more intrinsically adopted as a garment making model. Designers have started to incorporate sustainable practices in the industry such as recycling, using sustainable fabrics as well as reducing waste and moving away from the use of chemicals and pesticides.

The future of the fashion design sector in South Africa will depend on its ability to innovate and become more globally competitive as well as cementing a grip into the local market. Astute innovation strategies will enable the South African fashion design sector to continue to attract customers and to grow internationally. E-commerce presents an opportunity for the industry and has been transformative to how the industry operates.

In terms of visibility, the fashion design sector in South Africa has become prominent as a thriving sector of the fashion industry. The industry needs to become more creative and more adept in marketing its products to stay relevant and to develop.

In order to become internationally competitive, designers need to continually innovate and take risks. Versatility and adaptability are also important. Future research into the South African fashion industry on a large scale is necessary to fully interrogate the workings and trajectory of the industry. This research should be on an ongoing basis, tracking key performance indicators and building a repository of knowledge and data on the fashion industry in South Africa. Within the creative economy, the fashion design industry in South Africa is a key sector and needs to be developed to play a greater role particularly in terms of its ability to create jobs. There is much progress that has been made in the operations and development of the fashion design industry, but much more is needed to push forward an industry with importance to the South African economy.

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Authors' contributions

Both authors were involved in conceptualising the research; J.D.S. collected the data and wrote the report on which this article is based, with input and extensive review from N.G.G. including a review of the database constructed; N.G.G. drafted the article that we submit here, and J.D.S. edited it.

Ethical considerations

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