Drivers and Barriers of Fast Fashion Implementation in South African Retail

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This study aimed to identify the factors that comprise the drivers of, and barriers to, the implementation of fast fashion clothing in the retail industry in South Africa via a case study of one of South Africa's major fast fashion retailers. Using a quantitative, questionnaire-based, e-mailed survey to collect data from a self-selected convenience sample of 78 managers and employees, the study findings confirmed the importance of both information (store feedback and stock planning) and supplier relationships (capability and flexibility) as drivers of fast fashion. Overall, 'capability' was perceived overall as the most important factor, enabling adjustments to range, order size and market closer to the selling season. Barriers were confirmed as issues related to product (quality, authenticity, perishability) and social responsibility (environmental and exploitation/ethics) in the opinion of this retailer. Although both were perceived as important, environmental issues dominated, with respondents seeing the wastefulness and excessive consumption of fast fashion as the main barrier to its implementation in South Africa. The first research of its type in South Africa, the study contributes to knowledge about fast fashion in South Africa, and possibly in other developing countries, and should assist with the implementation of this strategy by South African retailers. Furthermore, a clear understanding of some of the negative opinions about FF might assist with a more socially responsible implementation.

Keywords: *fast fashion, clothing, retailing, supplier relationships, social responsibility*

JEL Classification: *L67, L81, M31*

1. Introduction

This paper focuses on the factors that encourage (drivers) or discourage (barriers) the Fast Fashion (FF) strategy in the context of the South African clothing retail industry. Fast fashion is defined as a positioning strategy that relies on a rapid response to current fashion trends (Byun and Sternquist, 2008; Aftab et al., 2018), offering consumers fashionable, stylish and unique products at affordable prices (Collett et al., 2013; Miller, 2013).

Fashion conscious, trend following consumers demand fashion forward items at a lower cost. This has resulted in the traditional fashion pyramid changing (Gereffi, 1999; Linden, 2016). Fast fashion is low-cost clothing that imitates luxury fashion brands (Joy et al., 2012; Matic and Vabale, 2015) and is characterised by rapid response to the latest trends, turning them around from runway to store floor in greatly reduced time (Cook and Yurchisin, 2017). To achieve this, the FF business strategy's objective is to reduce the time periods in the buying cycle, and so minimise the time for new fashion items to appear in shops (Barnes and Lea-Greenwood, 2006; Jeacle, 2015). Customers also end up experiencing perceptions of scarcity, as merchandise is made available more rapidly and in smaller quantities, thereby creating the need to purchase more swiftly than would occur with alternative merchandising strategies (Cook and Yurchisin, 2017). Globalisation has resulted in retailers becoming able to source low cost products in developing countries across the globe, thus enabling the expansion of FF (Mihm, 2010). This has enabled global FF leaders such as Zara, HandM and Benneton to incorporate many changes in their supply chains to reduce lead times and hence satisfy their customers (Aftab et al., 2018; Camargo et al., 2020).

Understanding the factors that influence the implementation and operations of FF is crucial for retailers. According to extant international literature, rapid response and flexibility have been identified as key drivers whilst product related issues such as quality, the wasteful nature of FF products and unethical behaviour are considered as key barriers to the FF strategy (Harris et al., 2016; Moon et al., 2017). The fashion/clothing industry worldwide is a highly competitive and volatile industry. Globally, FF is a strategy used by successful retailers to respond to increasing customer demands (Kim et al., 2013; Roelf, 2015; Aftab et al., 2018). Since the advent of globalisation and digitisation, the marketplace has changed. Customers expect more, with respect to the right product, at the right time and at the right price (Khaliliyeh, 2019).

The South African clothing industry has multiple stakeholders, many of whom are industry leaders. During the political isolation period, which ended in 1994, most products were locally produced (Van Zyl and Matswalela 2016). Since then, the industry has undergone rapid change (Hodson 2019), but finding it difficult to obtain economies of scale and hence difficulty in competing internationally (Van Zyl and Matswalela 2016). Local production accounts for about one third of clothing sales of the major retailers (Goko, 2017), with these retailers playing a crucial role in the value chain (Vika, 2016). However, with more international FF retailers, such as Zara, HandM and Cotton On, opening stores locally, competition has become intense and, therefore, a greater understanding of FF is needed to better assess this phenomenon's applicability in the SA clothing retail industry, and its ability to compete effectively with the new arrivals. Although much research has been conducted on the FF strategy globally, much less has taken place in SA. Only Moeng (2011), Matshitse (2016), Moodly (2020) and Biyase et al. (2021) discuss FF from a consumer perspective, but none of these focus on the drivers of and barriers to this strategy, and only Biyase et al. (2021) touches on it from the retailer's viewpoint. For these reasons, the question has still not been fully answered on what the main drivers and barriers are to employing an FF strategy in the South African retail industry?

The aim of this study was therefore to determine what the drivers and barriers are to employing an FF strategy in the South African retail industry. To achieve this aim, two research objectives were set:

1. To identify the key factors that drive the implementation of FF;

2. To identify the key barriers to the implementation of FF.

The extant literature discussed in the next section shows that, internationally, the main drivers of FF are the 'information' and 'supplier relationship' constructs and the main barriers to implementation of FF are the constructs 'product issues' and 'social responsibility'. Thus, to satisfy the objectives mentioned above the study needs to answer the research questions "to what extent are the constructs 'information' and 'supplier relationship' drivers of FF in South African retailing" and "to what extent are 'product issues' and 'social responsibility' barriers to FF in South African retailing.

2. Literature Review

2.1 Drivers of Fast Fashion

2.1.1 Information

FF depends on a well-coordinated company structure that relates to the supply chain and, in order to successfully implement FF, a number of factors need to be correctly employed to drive FF in the marketplace

There are a number of concepts, including vertical integration, Just-in-Time (JIT), quick response, and lean or agile supply chains, which are used by retailers to support their company goals and strategy. One of the most important of these is the quick response method which FF takes advantage of to improve the supply chain (Fiorito et al., 1998; Barnes and Lea-Greenwood, 2006). Rapid response and flexibility have thus been identified as key drivers to the FF strategy (Harris et al., 2016; Moon et al., 2017). This section therefore discusses the key drivers of FF, especially those that support quick response, i.e., the variables that promote or enable the FF strategy.

Quick response enables local manufacturers and retailers to compete through low prices by collaborating with offshore suppliers (Birtwistle et al., 2003; Fernie and Azuma, 2004). It emphasises flexibility and quick product turn around to meet the ever changing needs of a competitive, volatile and dynamic marketplace. To compete effectively, FF requires retailers to maintain flexibility and adaptability, (Bedford et al., 2016; Cook and Yurchisin 2017). Speed to market is essential in modern business and this time and agile-focussed approach allows for shorter delivery cycles. This quick response and speed to market is only achieved with good information systems (Birtwistle et al., 2003; Ghemawat and Nueno, 2006). Information is one of the key factors that influence effectiveness and is obtained through customer feedback. Since quick response reduces inventory, fewer items end up going on sale at the end of a season (Castelli and Brun, 2010; Cachon and Swinney, 2011). Information driven decisions are essential to quick response and thus to improving profitability (Christopher and Towill, 2002). For this, careful and up-to-date inventory control and stock planning is essential.

Furthermore, successful FF retailing is achieved through understanding consumer markets and being able to offer value added items at a reasonable cost (Yu et al., 2012; Taplin, 2014). The availability of technology and superior communications means that people are always up-to-date with both local and global trends. Therefore, continuous marketplace feedback is essential to understanding current consumer needs and their rapidly changing dynamics, which requires sound information systems that provide timeous and accurate feedback from retail stores and branches. Therefore, the FF retailer makes use of information technology, store feedback reporting and research to discover consumer needs and then to design and develop products timeously to meet consumer demand (Crofton and Dopico, 2007). As mentioned previously, the benefits of FF include reduced inventory levels, short lead times, flexibility and ability to constantly meet consumer demand. This is achieved not only through good planning but also by ensuring a constant flow of information to stay knowledgeable about market demands.

2.1.2 Supplier relationships

In traditional fashion retailing, the outsourcing of production had the advantages of cost saving for retailers, but in the long run led to risks which included longer lead times, excess costs, non-effective communication and the inability to meet current trends rapidly (Bhardwaj and Fairhurst, 2010). In contrast, FF retailers rely on short cycle and QR methods (Payne, 2016) to respond quickly to consumers' demands, which sets them apart from traditional retailers (Yu et al., 2012). Successful FF retailing is achieved through understanding consumer markets and being able to offer value added items at a reasonable cost (Yu et al., 2012; Taplin, 2014). For retailers to keep up with an evolving market and changes in operating methods, retailers need to ensure their organisations are flexible and innovative. Since fashion is a market driven industry, retailers need to align themselves with market trends and respond rapidly to environmental changes.

This requires the ability to incorporate, build and reconfigure, not only internal, but also the external, skills of all components back up their supply chain. Thus, quick response is achieved via a partnership strategy that ensures supplier and retailer continuously search for methods to respond speedily to consumer demand. The main concept in quick response is time, which requires all the supply chain processes to be extremely efficient. For retailers to have an effective and balanced supply and demand strategy, joint efforts by all components in the supply chain is essential (Castelli and Brun, 2010). Thus, improving the efficiency of collaboration and vertical integration within the whole supply chain is essential (Bruce et al., 2004; Birtwistle et al., 2006). As a result, a FF strategy requires a traditional supplier/buyer relationship, with both buyer and supplier collaborating through information sharing and strategic planning. This enables local suppliers and retailers to survive and compete against cheap imports. (Fernie and Azuma, 2004).

Through supportive and collaborative supplier relationships, FF retailers can achieve controlled inventories, as they manufacture in limited numbers. This means that these retailers do not have high inventory

in warehouses or distribution centres as the merchandise is sent directly to store shelves (Ghemawat and Nueno, 2006). These FF retailers depend on store personnel to constantly update them on products that are selling well which then enables them to make quick decisions on replenishment. With this strategy retailers use sales data to reorder from manufacturers in small quantities in real time, which is a contributor towards lowering of inventory levels and thus lowering of inventory holding costs, and so ultimately lower selling prices for consumers (Taplin, 2014). The typical FF retailer concentrates more on the capital intensive and value added parts of production, and outsources the more labour intensive and less value added stages of the supply chain. An example of this is Zara, as they perform the tasks of buying raw materials, design, quality control, packaging and distribution, but outsource the sewing component (Crofton and Dopico, 2007). By building strong relationships and using all resources, such as factories, designers and warehouses, in a more coordinated way a more agile supply chain which reduces both response time and cost is provided.

2.1.3   *Barriers to fast fashion*

Despite FF being one of the more current retail strategies in the fashion industry, downsides to this method of doing business do exist and have been used to criticise FF retailers. These so-called barriers can have a negative impact on the operation of FF. Perceived barriers include product related issues such as quality, the wasteful nature of FF products, unethical human resource conduct, a lack of corporate social responsibility and methods that do not contribute towards environmental sustainability. According to the extant literature, these are key barriers to the FF strategy (Harris et al., 2016; Moon et al., 2017). This section therefore outlines, in more detail, these perceived barriers to successful implementation of the FF strategy.

2.1.4   *Unethical conduct*

Although the clothing industry is one of the main employers in developing countries, and is an important contributor to their economies (Ansett, 2007), the FF industry is saturated, with an oversupply of FF clothing in the market. There has also been considerable controversy surrounding the fashion industry with retailers said to be exploiting Less Developed Countries (LCDs) with child labour and poor environmental legislation. Over the years FF retailers have been criticised for these unethical practices.(Arrigo, 2013; How Gap manages responsibility, 2014). Many of these LDCs lack local legislation and governance. Most workers in these countries have a low social profile, less education and poor occupational prospects, which means weak worker bargaining power. This makes them vulnerable in these buyer driven markets (Khurana and Ricchetti, 2016). However, in contrast, Alamgir and Banerjee (2019) stated that global supply chains are perceived as developmental forces, contributing to poverty reduction in developing countries, generating employment and boosting economic growth. These factors have contributed towards a new wave in more ethical fashion movements, including slow fashion consumerism in order to create more transparency and sustainability in the clothing supply chain (Moodly, 2020).

Because of the perceived ethical problems that can follow FF, companies realised that they needed to invest more in Corporate Social Responsibility (CSR) as a strategy to counteract these negative perceptions (Matshitse, 2016; Mrad et al., 2020). This has been referred to as an effective strategy to coordinate and better facilitate supply chain sustainability and governance in FF (Li et al., 2014). Compliance with changing corporate practices is imperative. In the beginning of the 1990s, the fashion industry was amongst the first industries to prioritise sustainability (Khurana and Ricchetti, 2016). The CSR concept can be defined as one that aims to benefit society. The benefits gained by companies are greater financial performance, with a positive image which attracts consumers and improves employee satisfaction and staff retention (Arrigo, 2013; Chang and Jai, 2015).

However, FF retailers' reputations have been tarnished over the years with some retailers being found guilty of labour exploitation and of purchasing product from 'sweatshops,' For example, The Gap was exposed in 2007 by an undercover investigator, and to avoid further embarrassment, they stopped dealing with 23 non-compliant factories. In 2011, Zara was also exposed for using a 'sweatshop' in Brazil, while Inditex was charged with 52 counts by the Brazilian government after rescuing 15 workers from dubious circumstances. HandM was also exposed for the use of 'sweatshops' in Indonesia (Cortez et al., 2014). These types of issues led to the 2013 Rana Plaza tragedy in Bangladesh (Luz, 2007; Fernie and Grant, 2015; Koenig and Poncet, 2022) - Bangladesh is the second largest exporter of Western fashion (Akter and Ahammed, 2018). The tragedy in Rana Plaza has been ranked as the deadliest in the clothing industry with a thousand people losing their lives

due to unsafe building and factory practices (Orsdemir et al., 2016; Perry and Wood, 2018). This incident increased social awareness and a realisation of the importance of ethical trading. This awareness has resulted in consumers thinking before purchasing, with a move towards retailers who are Fair Trade Certified (Khan et al., 2017).

South Africa has not been exempt from the injustices suffered within the clothing industry. There have been reports of a number of cases pertaining to abuse of staff, and unethical conduct. One example is that of unethical labour practices in clothing factories in the town of Newcastle in KwaZulu Natal province. The poor working conditions in these factories not only negatively impacted on the workers but on the factory owners too. It was 10 years since the implementation of Basic Conditions of Employment Act and these factories had still failed to fully comply. Manufacturers in SA must compete against cheap imports, making small profits, and are continuously chasing deadlines to avoid penalties imposed by retailers, or worse, cancellation of orders, leading to them taking short cuts and possibly accepting unethical practices (Nattrass and Seekings, 2013).

2.1.5 Environment

The term sustainability refers to the ability of maintaining the status quo over an indefinite period of time. Sustainability is defined by Bojonca (2019) in business in terms of the following dimensions:

- The economic dimension: where businesses must commit to responsible consumption;
- The social dimension: which serves to ensure social equality and workers' rights. Ensuring upliftment of less developed countries;
- The environmental dimension: which analyses the impact on the planet, not only for the current generation but ensuring businesses leave a better environment for next generations.

The rise in sustainable consumerism over the years, has seen more and more people being conscious and mindful of what they are purchasing and where the item came from (Joy et al., 2012; Chang and Jai, 2015; Boström and Micheletti, 2016). FF changed the industry as it was traditionally known and the negative impact resulting caused an increase in advocacy for Slow Fashion to ensure ethical conduct takes place in sourcing and distribution (Fernie and Grant, 2015; Centobelli et al., 2022). FF products are a concern for sustainability, as items are not always the best quality and therefore not designed for longevity. Because these items are so cheap the consumer buys more than usual due to the lower prices and the fact that many of the items are designed to only last for about ten washes before they begin to deteriorate (Linden, 2016; Matshitse, 2016; Hellström, 2017; Wren, 2022).

These are then disposed in already overflowing landfills where clothing and materials that are not eco-friendly are leaving a pollution footprint, resulting in the use of the title of "disposable fashion" (Gabrielli et al., 2013; Cortez et al., 2014; Fernie and Grant, 2015; Bommel, 2016). This has resulted in the rise in social movements of anti-consumption, which have put FF retailers under the spotlight, leading to them having to reconsider the implementation of their strategy (Kim et al., 2013). There is an increasing movement of consumers choosing products that are produced without causing any harm to humans or nature. Over-consumption of FF products has become a global phenomenon and SA is said to be already experiencing this at an alarming rate despite being a developing country (Moodly, 2020).

The need for more clothing at lower cost has had a negative impact on workers, sustainability and the environment, which some writers have referred to as "a race to the bottom," This has occurred from the 2000s to 2010s when companies sourced more and more in the low priced developing countries (Fernie and Grant, 2015; Boström and Micheletti, 2016; Hellström, 2017). With increasing globalisation, supply chains have been sourcing from all over the world, and in the process have reduced traceability from where products and components are procured (Khan et al., 2017). This makes it difficult to control and reduce unethical practices and to enforce labour and environmental legislation aimed at reducing such practices.

For retailers to partake in CSR and ensure that required policies are carried out, requires commitment and finances (Arrigo, 2013), The Gap and HandM have started with sustainability and CSR initiatives which is a step in the right direction. Companies need to adopt sustainable strategies in order to achieve better coordination between environmental, economic and social performance (Li et al., 2014; Perry and Wood, 2018). This is referred to as the triple bottom line, where retailers must be able to achieve their current needs and have consideration for future generations (Shen, 2014; Cortes, 2017).

3. Research Methodology

3.1   Research Design

Large chains are dominant in retail distribution across all sectors of South African retail (Ryke, 2019). Because of the power of these large chains, the value chains, or supply chains, are buyer-driven (Perry and Wood 2018: 8), with most merchandise still being imported (Roelf, 2015).The key retail chains in the South African clothing industry are Edgars, Foschini, Mr Price, Truworths and Woolworths. In this study, a case study approach was employed to investigate the operations of one of South Africa's major clothing retailers, who is a typical low price, high fashion retailer with branches throughout the country.. To maintain confidentiality, as requested by the company being researched, the selected company has been called "Alpha Clothing."

This study was empirical in nature, using a positivist research design which involved a cross-sectional survey methodology. The research approach was essentially descriptive as the aim was to identify the importance of the influence of various constructs on a retailing phenomenon, namely fast fashion. This was done by means of a self-completion quantitative questionnaire with closed-ended responses, completed by Alpha Clothing managers and employees who were knowledgeable about FF and the supply chain. The raw data collected through the survey was then subjected to descriptive and inferential statistical analysis.

3.2   Respondent Selection

The study focused on a target population comprising of managers and employees across eight key departments, namely Buying, Planning, Resource, Trend and Design, Supply Chain, Ethical Compliance, Operations, and Quality. These departments represent critical touchpoints within the clothing retail supply chain. It is worth noting that the staff in each of these departments possess a comprehensive understanding of their respective roles in the supply chain, largely due to their participation in Alpha Clothing's thorough induction program and the company's policy of staff rotation.

The selection of Alpha Clothing as the case study subject was carried out using purposive sampling. This choice was made because Alpha Clothing is a prominent fast-fashion retailer to which the researchers had access, making this company a suitable candidate for an in-depth examination of supply chain dynamics. In the subsequent step of the sampling process, purposive sampling was again employed in selecting the eight specific departments involved in the supply chain operations of Alpha Clothing.

To identify the actual survey respondents within these departments, convenience sampling in the form of self-selection was used. In this approach, questionnaires were sent to all members of the eight departments. Individuals voluntarily opted to participate in the survey by completing the questionnaire. The desired sample size for this study was determined using statistical calculations. With a significance level set at 95 percent, an acceptable margin of error of 0.1 (based on a 5-point Likert-type scale), and an assumed variance of 1, the t-distribution suggested a sample size of 144 respondents from a total population of 225 individuals (excluding a correction factor) (Sekaran and Bougie, 2016).

3.3   Data Collection

3.3.1   Data Collection Instrument

The questionnaire, structured with closed ended questions, was derived from extant literature, as shown in Table 1. A five point, Likert-type scale, anchored with 1 = Strongly Agree and 5 = Strongly Disagree, formed the response categories. The questionnaire was pilot tested by a statistician and two subject matter experts. Then the questionnaire was pre-tested with ten industry experts (clothing or retail lecturers, analysts, managers, researchers, and SC managers/staff from other, but similar, clothing retailers. This was conducted online via a link to the questionnaire in an email sent to the ten industry experts. The questionnaire showed reliability for a new instrument, with Cronbach's alpha scores of 0.874, 0.727, 0.838 and 0.691, respectively for the four major constructs (information, supplier relationships, product issues, social responsibility) (Sekaran and Bougie, 2013).

Table 1: Source and Derivation of Questionnaire

Drivers of fast fashion			
Information	Store feedback	Allows real time sales data sharing	Fernie and Azuma, 2003
		Commonality in info systems support changing requirements	Roll, 2010
		Spreading flow of info throughout supply chain network	
		Collaboration between store managers, HO buyers and planners	Mihm, 2010
	Stock planning	Allows inventory Reduction	Fernie and Azuma, 2003
		Allows achievement of faster inventory turn on	Bruce and Daly, 2011; Cook and Yurichisen, 2017;
		Small amounts of inventory are kept in the system	Birtwistle et al., 2003
		There is reduced stock holding for store	Crofton and Dopico, 2007
		Allows me to buy fewer units at one time	Fiorito et al., 1998
		Increased sales through info sharing	Fernie and Azuma, 2004
Supplier Relationship	Capability	Supplier has facility of short cycle manufacturing	Birtwistle et al., 2003
		Suppliers can cope with changing production volume and variety	Roll, 2010
		Respond to improvement suggestions from suppliers and provide them with feedback and complaints	Yu and Ramanathan, 2012
		There is a close relationship with supplier	Birtwistle et al., 2003
	Flexibility	Relationship with supplier in managing changing environment	Roll, 2010
		Difficult to achieve as I lack cooperation of many suppliers	Fiorito et al., 1998
		Enables buying commitments closer to actual selling season	
		Range of delivery frequency and possible size order	Roll, 2010
Barriers to fast fashion			
Product issues	Quality performance	Product quality is not good enough	Kim et al., 2013
		Clothing form changes after washing and repeat use	
		Products are low priced and not durable at all	
		Styles are too trendy to use for a long time	
		Product is not built to last long	Joy et al., 2012
	Authenticity	Styles are not original	Kim et al., 2013
		Styles are similar to other brands	
	Perishability	New styles are introduced on a frequent basis	Cook and Yurichisen, 2017
		Products are fresh in terms of fashion trends	
Social responsibility	Environmental	FF stimulates over consumption	Kim et al., 2013
		FF encourages disposability	Joy et al., 2012
	Exploitation / Ethics	FF exploits labour in less developed countries	Kim et al., 2013
		Systems are in place to monitor supplier ethical misconduct	
		Systems are in place to monitor compliance of trade policies	King, 2017

3.3.2 *Administration of the Instrument*

The questionnaire was sent to all 225 staff members of the selected Alpha Clothing departments via WhatsApp as well as by email because, according to Saied et al., (2014), most people check their mail via mobile phone more often than via computer. Daily tracking of responses, follow up emails and personal contact were used to encourage responses.

3.4 Data Analysis

Data was captured into Statistical Package for Social Sciences (SPSS) version 25. After checked for administrative errors, descriptive statistics (means of questions variables and constructs) and cross tabulations were presented in graphs for each of the Likert response categories, showing the respondents' agreement or disagreement with the variables that constitute each section. This provided the respondents' scoring patterns per variable. The significance of the findings was tested with Fisher's exact test rather than a chi square test as the data did not meet the requirements for a chi square test.

3.5 Validity and Reliability

The pilot study and pre-test, mentioned previously, indicated satisfactory face and content validity and reliability. This was confirmed by the Cronbach's coefficient alpha of the whole sample and by the exploratory factor analysis that showed that the questions represent the issues being researched. This was as expected because the questions were sourced from previously validated questionnaires.

4. Analysis and Results

4.1 Profile of Respondents

The targeted sample was not achieved despite numerous email and personal reminders, and since ethical standards had to be maintained, the resultant sample was accepted. The achieved sample exceeded the minimum sample sizes of Sekaran and Bougie's (2016) 30 or Allen's (1982) 50.

With a minimum of two responses from each department (as shown in Table 2), the sample provides a reasonable spread across, and representation of, the target population. However, the findings should be viewed as exploratory and the small convenience sample can be seen as a limitation of this study.

Table 2: Sample Profile

Department	Frequency	Population	% of Population	% of sample
Buying	21	64	32.8%	26,9%
Ethical	3	3	100.0%	3,8%
Operations	2	29	6.9%	2,6%
Planning	24	87	27.6%	30,8%
Quality	18	22	81.8%	23,1%
Resource	3	5	60.0%	3,8%
Supply Chain	4	4	100.0%	5,1%
Trend and design	3	11	27.3%	3,8%
Total	78	225	34.7%	100.0%

4.2 Reliability and Validity

An acceptable reliability coefficient is 0.70 or higher (Taber, 2018). Item analysis was conducted for the questionnaire statements, with Table 3 summarising the scores of the four key factor categories.

Table 3: Cronbach's Coefficient Alpha

Constructs	N of Items	Cronbach's α
Information	10	0.821
Supplier Relationship	8	0.850
Product	10	0.746
Social Responsibility	5	0.655

The Cronbach's coefficient alpha values for all constructs exceed the recommended reliability scores of 0.600 (Khare and Rakesh, 2010) for a newly developed construct. All the constructs scored above the "acceptable" 0.7 apart from social responsibility, which was close at 0.655, thus showing that the questionnaire provides acceptable, consistent scoring.

Exploratory factor analysis was used to assess how well the questionnaire represents the variables. A Kaiser-Meyer-Olkin Measure of Sampling Adequacy and a Bartlett's Test of Sphericity were conducted to assess the adequacy of the data for a factor analysis. In all instances the requirements of KMO being greater than 0.50 and Bartlett's Test of Sphericity being less than 0.05., were satisfied, as indicated in Table 4.

Table 4: KMO and Bartlett's Test Results

Section Name	Kaiser-Meyer-Olkin measure of sampling adequacy	Bartlett's Test of Sphericity		
		Chi square	df	Sig.
Information	0.799	260.466	45	<.0005
Supplier Relationship	0.793	255.635	28	<.0005
Product issues	0.726	242.861	45	<.0005
Social Responsibility	0.609	66.406	10	<.0005

The exploratory factor analysis (see Table 5) showed that items loading at or above 0.5 (and using the higher or highest loading in instances where items cross-loaded at greater than this value) effectively measured along the various components. As shown by the shading, the questions constituting the sections loaded along two or three components (sub-themes).

The factors resulting from the factor analysis were similar to the variables in the literature-derived framework, showing that the questionnaire adequately represents the drivers and barriers as specified in the research objectives.

Table 5: Exploratory Factor Analysis

Rotated Component Matrix (*exploratory*)	Components		
Information (Rotation converged in 3 iterations)	Store feedback	Stock planning	
Collaboration between store managers, HO buyers and planners	.814		
Keeping smaller amounts of inventory in the system	.803		
Info sharing that allows achievement of faster inventory turn	.713		
Flow of information throughout SC network	.650		
Info systems that allow for sharing of real time sales data	.633		
Availability of info for inventory reduction in stock planning	.620		
Info that enables the reduction of stock holding in the store	.466		
Increased sales through information sharing		.807	
Commonality in info systems within SC to support changing requirements		.760	
Information allows for the purchase of fewer units at a time		.693	
Supplier Relationships (Rotation converged in 3 iterations)	Capability	Flexibility	
Supplier relationships enable commitments closer to selling season	.775		
Supplier relationships that allow flexibility to changing environment	.746		
Responding to improvement suggestions from suppliers	.642		
Close relationships with suppliers	.639		
Suppliers able to deliver range of products on a regular basis.	.577		
Suppliers that are flexible with regard to order size	.572		
Suppliers that can facilitate short cycle manufacturing		.885	
Suppliers that can cope with changing production volume and variety		.913	
Product issues (a. Rotation converged in 5 iterations)	Quality perform	Authenticity	Perishable
Poor product quality	.906		
Low retail prices	.856		
Deterioration of clothing after limited washing/wearing	.720		
Styles are knock offs of other brands		.842	
Frequent introduction of new styles		.751	
Styles lack originality		.733	
Products are fresh and up to date		.543	
Most styles / trends are short lived			.876
Products are not designed to be durable			.793
Customer perception of low price discourages purchase			.636
Social Responsibility (a. Rotation converged in 3 iterations)	Exploitation/ ethics	Environment	
Need to comply with policies related to ethical trading in SC	.884		
Difficulty in monitoring ethical misconduct in SC	.787		
FF exploits labour in less developed countries	.714		
FF is wasteful		.805	
FF stimulates excessive consumption		.783	

* Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalisation

The variables identified by the EFA were further evaluated via three key reliability metrics: Cronbach's Alpha (**α**), Average Variance Extracted (AVE), and Composite Reliability (CR). These metrics, as shown in Table 6, provide an indication of the internal consistency, shared variance, and overall reliability of the subthemes, respectively. Thresholds for these statistics are **α** > .6 for new constructs (Ab Hamid, Sami and Mohmad Sidek, 2017), and AVE > .5 and CR > .7 (Alarcón and Sánchez, 2015).

Table 6: Reliability of constructs identified by EFA

Constructs/Sub-constructs	Cronbach's Alpha	AVE	CR
Information			
Store feedback	0.823	0.430	0.565
Stock planning	0.670	0.703	0.597
Supplier relationships			
Capability	0.876	0.648	0.456
Flexibility	0.822	0.373	0.455
Product issues			
Quality performance	0.798	1.042	0.765
Authenticity	0.726	1.294	0.834
Perishability	0.759	0.968	0.789
Social responsibility			
Environment	0.489	0.852	0.592
Exploitation/ethics	0.726	1.270	0.829

Sub-constructs with Cronbach's Alpha, AVE, or CR values below the recommended acceptable thresholds may require further scrutiny, although internal consistency and shared variance are mostly acceptable for a newly developed model such as this. However, low reliability can affect the validity of any conclusions drawn from the data and so it may be beneficial to revise the questions related to the sub-constructs with low CR scores or to consider them as separate constructs. For sub-constructs with acceptable levels, they can be reliably used for further analyses and interpretations.

4.3   Descriptive Statistics

To investigate and understand the drivers and barriers and their component sub-constructs, a detailed descriptive analysis was conducted. Thus, Table 7 provides the means, standard deviations and distribution information (skewness and kurtosos) for the main constructs (information, supplier relationship, product issues, social responsibility) and the sub-constructs (store feedback, stock planning, capability, flexibility, quality performance, authenticity, perishability, environment, and exploitation/ethics).

The means of the Likert scaled questions were analysed with 1 = strongly agree through to 5 = strongly disagree, with all proving significant at $p < 0.05$. As can be seen from Table 7, all the drivers (1.68 to 1.95) reflected more agreement than the barriers (2.1 to 2.8), although all tended towards agreement with all means being lower than the mid-point between agreement and disagreement of 3.

The strongest agreement for drivers was with the issue of 'capability' in the 'supplier relationship' (1.68), while the weakest was 'store feedback' issue of 'information' (1.95). Regarding barriers the issue with the strongest agreement was 'environment' in 'social responsibility' (2.1), while 'authenticity' in product issues had the least agreement (2.8). Overall, the most agreement is with the 'supplier relationship' construct (1.7), while the least agreement is with the 'product construct' (2.52).

The distribution statistics (Skewness and kurtosis) mostly indicate acceptable and understandable variances from a normal distribution. Of particular interest is the kurtosis score of 'authenticity' (6.78), which indicates some extreme opinions about authenticity.

Table 7: Descriptive Statistics of Constructs and Sub-constructs

	Construct	Mean	SD	Skewness	Kurtosis	Sub-constructs	Mean	SD	Skewness	Kurtosis
Drivers	Inform-ation	1,88	0,439	-0.38	-0.05	Store feedback	1,95	0,507	-0.28	-0.42
						Stock planning	1,84	0,462	-0.19	-0.38
	Supplier Relations	1,70	0,470	0.11	-0.75	Capability	1,68	0,576	0.89	1.56
						Flexibility	1,74	0,466	-0.33	-1.08
Barriers	Product issues	2,52	0,573	0.35	0.34	Quality perform	2,40	0,651	0.24	0.53
						Authenticity	2,80	0,000	-0.50	6.78
						Perishability	2,62	0,873	0.33	-0.86
	Social Re-sponsiblity	2,27	0,680	0.91	2.67	Environment	2,10	0,751	1.32	2.99
						Exploitation/ethics	2,38	0,906	0.30	-0.06

A correlation was run amongst the four main constructs identified from literature, namely 'information' and 'supplier relationships' (drivers) and 'product issues' and 'social responsibility' (barriers). The correlation matrix in Table 8 confirms clearly that the two driver variables are related (0.431 correlation, $p<0.000$ significance), and that the two barrier variables are related (0.54, $p<0.000$). This could mean that strong supplier relationships are accompanied by sound sharing of information between stakeholders, and so both good information sharing and strong supplier relationships may well lead to better implementation of FF strategy.

Regarding barriers, the significant correlation between the barrier variables seems to indicate that negative perceptions of the FF product are also accompanied by perceptions of poor social responsibility. FF is a strategy that often comes at a human or environmental cost and so retailers need to find better, more acceptable, practices when implementing it. For example, to overcome such barriers, retailers need to address the issues of quality, authenticity and perishability, while at the same time ensuring that they minimise the environmental impact of their FF clothes and avoid any perceptions of exploitation of people or the environment, or other unethical activities. This can be done through socially responsible sourcing of quality product and also participating in clothing recycling programmes.

Table 8: Correlation Matrix of Driver and Barrier Constructs

		Information	Supplier relations	Product	Social responsibility
Information	Pearson Corr	1			
	Sig. (2-tailed)				
	N	78			
Supplier relationship	Pearson Corr	.431[**]	1		
	Sig. (2-tailed)	0,000			
	N	77	77		
Product	Pearson Corr	0,091	0,139	1	
	Sig. (2-tailed)	0,445	0,244		
	N	73	72	73	
Social responsibility	Pearson Corr	0,055	0,031	.540[**]	1
	Sig. (2-tailed)	0,655	0,804	0,000	
	N	68	67	68	68

Note: **. Correlation significant at 0.01 level (2-tail); *. Correlation significant at 0.05 level (2-tail).

To provide a more detailed understanding of the relationships between the sub-constructs and their contributions to the four main driver and barrier constructs, a correlation analysis involving the sub-constructs was conducted, as shown in Table 9. The significant relationships, as indicated by shading, are not unexpected. The strongest significant relationships tend to be between the sub-constructs making up their main construct, e.g., the strongest relationship is between store feedback and stock planning, which comprise the Information construct.

Table 9: Correlation matrix of sub-constructs

| | | | Information | | Supplier relations | | Product issues | | | Social responsibility | |
			Store Feedback	Stock Planning	Capability	Flexibility	Quality performance	Authenticity	Perishability	Environment	Exploitation /ethics
Information	Store Feedback	Pearson Corr	1								
		Sig. (2-tailed)									
		N	78								
	Stock Planning	Pearson Corr	.687**	1							
		Sig. (2-tailed)	0,000								
		N	78	78							
Supplier relations	Capability	Pearson Corr	.312**	.398**	1						
		Sig. (2-tailed)	0,006	0,000							
		N	77	77	77						
	Flexibility	Pearson Corr	.327**	.372**	.630**	1					
		Sig. (2-tailed)	0,004	0,001	0,000						
		N	77	77	77	77					
Product issues	Performance	Pearson Corr	-0,027	0,134	0,173	0,192	1				
		Sig. (2-tailed)	0,820	0,259	0,146	0,107					
		N	73	73	72	72	73				
	Authenticity	Pearson Corr	0,082	0,032	-0,099	0,014	-0,019	1			
		Sig. (2-tailed)	0,476	0,778	0,391	0,901	0,871				
		N	78	78	77	77	73	78			
	Perishability	Pearson Corr	0,063	0,151	0,090	0,100	.362**	-0,054	1		
		Sig. (2-tailed)	0,599	0,204	0,451	0,404	0,002	0,652			
		N	73	73	72	72	73	73	73		
Exploitation/ ethics	Environmental	Pearson Corr	-0,078	0,062	0,022	0,190	.519**	0,022	0,112	1	
		Sig. (2-tailed)	0,529	0,618	0,863	0,123	0,000	0,858	0,364		
		N	68	68	67	67	68	68	68	68	
	Exploita-tion/Ethics	Pearson Corr	0,018	0,101	-0,023	0,014	.291*	0,035	.460**	0,237	1
		Sig. (2-tailed)	0,882	0,413	0,852	0,912	0,016	0,778	0,000	0,052	
		N	68	68	67	67	68	68	68	68	68

Note: **. Correlation significant at 0.01 level (2-tail); *. Correlation significant at 0.05 level (2-tail).

4.4   Perceptions of the Drivers of Fast Fashion

This section is based on respondents' perception of statements made about the drivers of an FF strategy by providing percentages for grouped strongly agree and agree (green in the graphs) and grouped strongly disagree and disagree (red in the graphs). This section aims to identify specific issues within the constructs that encourage the adoption of FF, looking at what are the key drivers of FF strategy.

4.4.1   Descriptive analysis relating to "Information" as a driver of FF

This section covers information factors (store feedback and stock planning) that encourage the adoption of FF. Figure 1 indicates the scoring patterns of respondents with regard to information as a driver of FF in Alpha Clothing. This presents the sum of agreement and disagreement of respondents on the statements about information being a driver of FF. All questions in this section scored positive results, indicating that most respondents agree that information is a driver of FF.
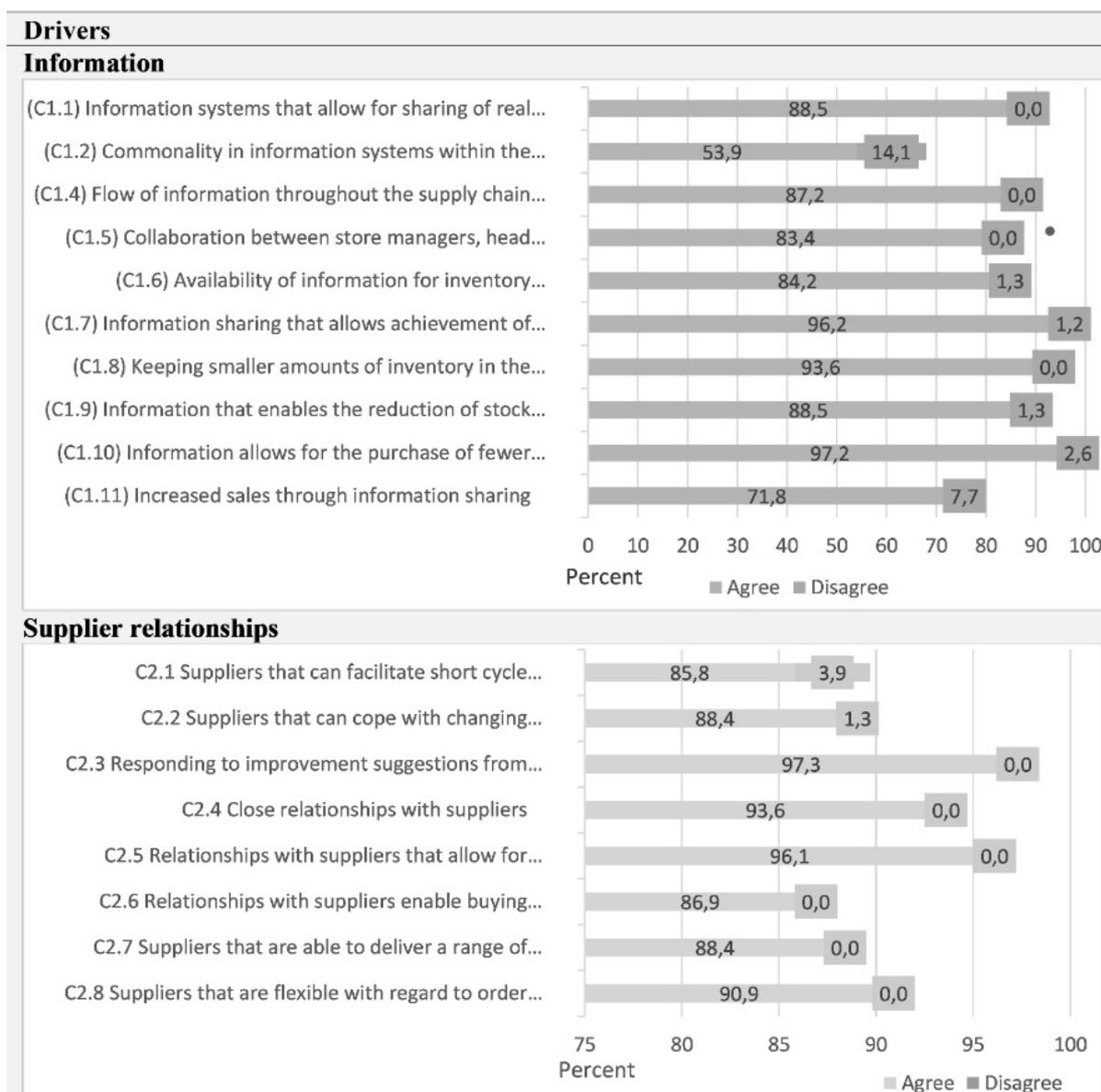
Figure 1: Drivers – Information and Supplier Relationship Perceptions

The consensus is that most respondents agree on information being a driver of FF, as most responses are positive. FF is an evolving phenomenon and as such, requires retailers to maintain flexibility to keep ahead

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of their competitors. For the business to supply the correct product at the right time, information plays a critical role. Zara, one of the pioneers of FF, has proved that information sharing is a critical tool in FF. This company has prioritised investing in IT systems to ensure that there is effective communication between all stakeholders involved in the process (Mihm, 2010). Further, these findings support Bhardwaj and Fairhurst (2010) who found that one of the characteristics of FF is the achieving of faster inventory turn on, thus reducing longer lead times risk, excess costs, non-effective communication and the inability to supply current trends timeously.

4.4.2   Descriptive analysis relating to "Supplier relationship" as a driver of FF

This section covers the supplier relationship factors (capability and flexibility) that encourage the adoption of FF. Figure 1 shows the respondents' scores for supplier relationship as a driver of FF in Alpha Clothing by providing combined agreement and disagreement percentages.

A sum of 85.8 percent respondents agreed that suppliers who can facilitate short cycle manufacturing are critical in FF. A sum of 88.4 percent agrees that suppliers that can cope with changing production volume and variety are important. The highest level of agreement in this section was responding to improvement suggestions from suppliers with a 97.3 percent agreement percentage. Close relationships with suppliers received 93.6 percent agreement level, relationships with suppliers that allow for flexibility in response to the changing environment had 96.1 percent response. A sum of 86.9 percent agrees that relationships with suppliers that allow buying closer to the actual selling season are important. Agreement on suppliers that can deliver a range of products on a regular basis at 88.4 percent. A sum of 90.9 percent agrees on the importance of suppliers that are flexible regarding order size. Although this section had the most positive responses on all questions, none of them were statistically significant.

These findings support literature that reveals that it is important to have a collaborative supplier relationship in business. Clothing retail businesses are highly dependent on buyer-supplier relationships and they need to work together to be competitive. Other studies indicate that good supplier relationships are a crucial factor in the use of quick response which is a key factor in FF (Direction, 2015; Biyase et al., 2021).

4.4.3   Discussion

Sound, timeous information enables both retailer and supplier to replenish stock using consumer demand information rather than through forecasting (Lowson et al., 1999). The retailer-supplier relationship can only be successful through the sharing of information. These relationships enable shorter cycles between manufacturing and distribution (Birtwistle et al., 2006). The development of IT systems is critical in FF retailing. If companies' want to be ahead in the game they need to invest in Point of Sale (POS) systems and Electronic Data Interchange (EDI) to have an efficient and accurate flow of information. Accurate information on customer preferences can lead to increasing production on items that are selling, or reducing production of products that are not moving (Jeacle, 2015). It is important in FF to have suppliers that allow flexibility in response to the changing environment by retailers investing in information systems that allow sharing of real time sales data.

The above analyses and discussion show that the first research objective, "To identify the key factors that drive the implementation of FF," has been met. These findings confirm the importance of supplier-retailer relationships and information sharing in the retail industry.

4.5   Perceptions of Barriers to Fast Fashion

This section is based on respondents' perceptions of statements made about the barriers towards an FF strategy. The results are first presented using the aggregated percentages for strongly agree/agree (green on the graph) and strongly disagree/disagree (red on the graph) responses. These results provide an indication of the perceived importance of the various statements. This analysis aimed to further explain the factors that discourage the adoption of FF, that is, the key barriers to a FF strategy.
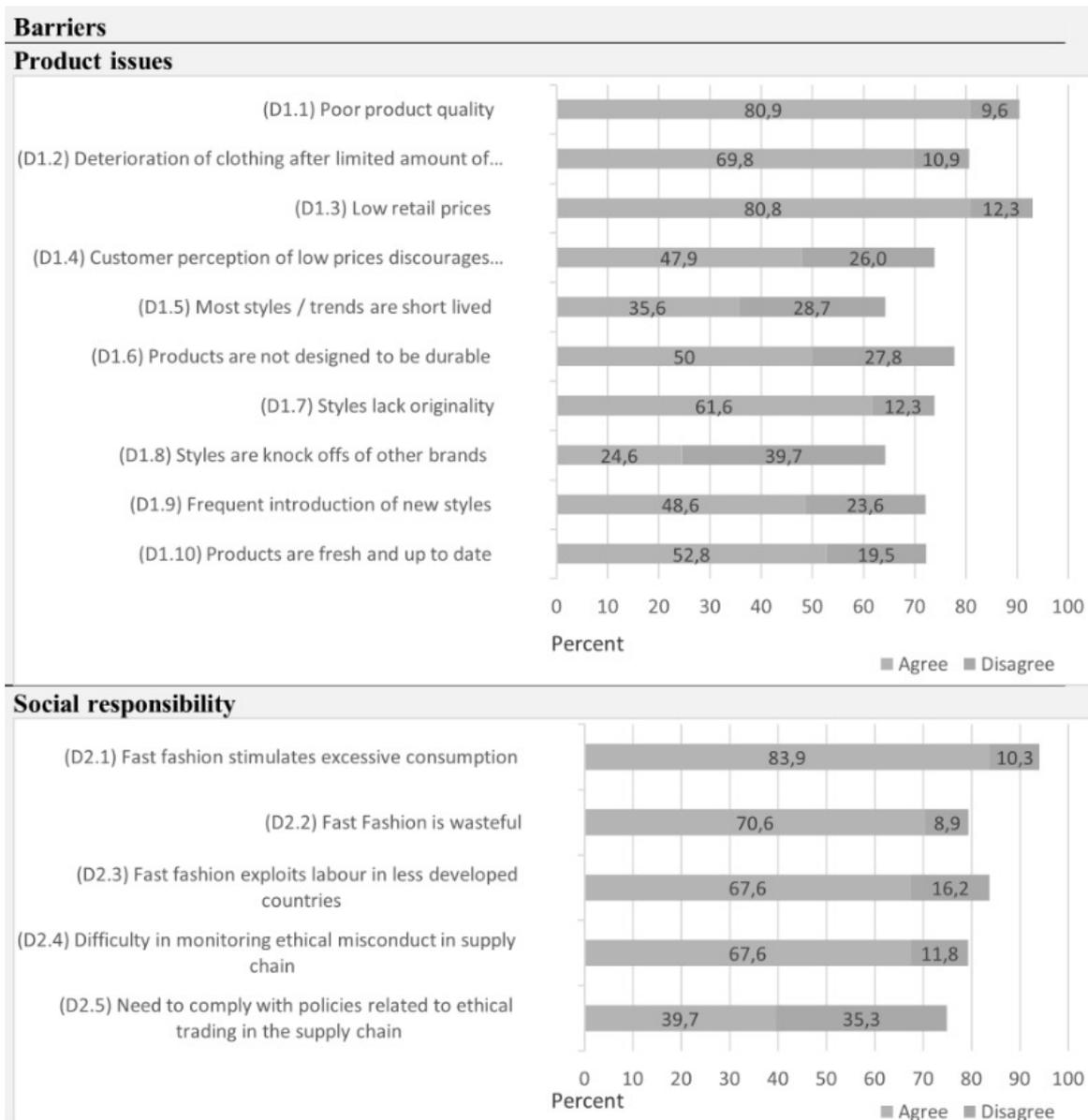
Barriers

Product issues

Social responsibility

Figure 2: Barriers – Product Issues and Social Responsibility

4.5.1   Descriptive analysis relating to "Product issues" as a barrier to FF

In this section, the analysis of the statements making up the product issues (quality performance, styles (authenticity), disposable) that discourage the adoption of FF in Alpha Clothing is presented, with the results being illustrated in Figure 2. This figure is a presentation of the sum of agreement and disagreement of respondents with the statements about product being a barrier to FF. There was no uniformity in the overall agreement or disagreement with the statements. The highest agreement was with 'poor product quality' at 80.9 percent and 'low retail prices' at 80.8 percent, while the highest levels of disagreement were 'styles are knock offs of other brands' at 39.7 percent, considerably higher than its level of agreement (24.6 percent) and 'most styles /trends are short lived' at 28.7 percent. It should be noted that, other than 'styles are knock offs of other brands,' all the statements reflected higher agreement than disagreement, unlike the pattern for the drivers constructs. However, the overall differences between agreement and disagreement were not as great as for the other constructs, indicating considerable uncertainty amongst the respondents as to the importance of 'product issues' as barriers to the successful implementation of FF.

One of the characteristics of FF is to offer runway fashion at affordable prices for mass consumption. For retailers to be able to offer such products at low prices, there is a sacrifice to be made, and this is generally on the quality of the product. This is indicated by the agreement level of 80.9 percent of respondents to, 'deterioration of clothing after limited amount of washing and wearing,' which confirms that respondents

believe FF products are not known for longevity. According to Linden (2016), Hellström (2017) and Wren (2022), some items only last for about ten washes before they begin to deteriorate. This could mean that retailers frequently offer fashion items which by design have a short life span.

4.5.2 Descriptive analysis relating to "Social responsibility" as a barrier to FF

The social responsibility factors that discourage the adoption of FF (barriers) are discussed in this section, with Figure 2 indicating the combined agreement and disagreement scoring with regard to the social responsibility sub-constructs (environment and unethical).

Figure 2 is the presentation of the combined 'strongly agree' and 'agree' contrasted against their 'disagree' and 'strongly disagree' percentages. Most responses in this section were strongly in agreement with the statements, except for the 'need to comply with policies related to ethical trading in the SC,' which received only a 39.7 percent combined level of agreement and a 35.3 percent combined level of disagreement – this implies a high level of uncertainty about policies related to unethical trading. The highest level of agreement was with 'FF stimulates excessive consumption' with 83.9 percent. The remaining questions ('FF is wasteful,' 'FF exploits labour in less developed countries' and 'there is difficulty in monitoring ethical misconduct') all had high agreement with low levels of disagreement.

Based on these responses there is a contradiction in that the vast majority hold attitudes about FF being wasteful, exploitative, encouraging excessive consumption and with ethics difficult to monitor, less than 40 percent of the respondents felt the need to comply with ethics policies. The Rana Plaza incident raised awareness internationally and has resulted in some consumers thinking before buying purportedly unethical FF and making conscious decisions to purchase from retailers who are Fair Trade Certified (Khan et al., 2017). Therefore, the importance for all retailers to comply with ethical trade policies and to include awareness of this in their promotional policies cannot be stressed enough.

4.5.3 Discussion

It is important for businesses to be sustainable, not only currently, but for future generations. Sustainability refers to the ability to respect people, the planet, the community and the resources (Joy et al., 2012). The clothing industry SC is complex and lacks transparency, which creates loopholes for unethical trade. It is important to note that there is a lack of clarity on how to implement such Corporate Social Responsibility (CSR) measures. It is difficulty for retailers to enforce these measures in an industry that seems to lack transparency (Caro and de Albeniz, 2014). The above findings and discussion have shown the importance of product issues and social responsibility in the clothing retail industry. Therefore, the second research objective, namely "To identify perceived barriers to FF is SA," has been met.

5. Discussion and Implications

5.1 Objective 1: "To identify the perceived drivers of FF in SA"

5.1.1 Previous research

According to the literature, the availability of information is crucial in the retail clothing business, being an essential tool for decision making. Information is one of the main influencing factors of effectiveness in the supply chain (Bruce and Daly, 2011; Cachon and Swinney, 2011). Supplier relationships are also key drivers that enable a competitive edge for retailers (Ahmad, 2012; Moon et al., 2017). Supplier relationships form part of the supply chain management strategy, contributing towards the achievement of multiple benefits.

5.1.2 Current findings

5.1.2.1 Information

This study has shown that most respondents from Alpha Clothing agreed that information is of considerable importance in FF. Respondents agreed that a commonality in information systems in the supply chain supports changing requirements, with these systems allowing for real time sales data sharing. Respondents agreed that the flow of information should be throughout the supply chain network to enable

efficient collaboration between store managers, head office buyers and planners as key players in the supply chain. The majority of respondents also agreed that information sharing has an equally great impact on inventory management, allowing for inventory reduction in stock planning and achieving faster inventory turn on as indicated by Jeacle (2015) and Cachon and Swinney (2011). Retailers benefit as they can purchase fewer units at a time, meaning that there are smaller amounts of inventory in the system and reduced stock holdings in store.

5.1.2.2 Supplier relationships

Supplier relationships are critical in the retail clothing sector, as suppliers are the source of products. This study aimed to identify the effect of relationships with suppliers and what benefits these provide, as supplier relationships are regarded as one of the key drivers of FF. Most respondents in Alpha Clothing had a high combined level of agreement with all responses, achieving above 85 percent. Respondents agreed with the importance of having sound relationships with suppliers, which allow for flexibility in response to changing environments, which supports the findings of Moon et al. (2017). These relationships also enable buying commitments to be made closer to the actual selling season.

5.1.3   Conclusion

There is evidence in past research that indicates the importance of information in the FF strategy. Much research has been conducted on Zara, the international FF giant, with reference to the success they have experienced in information sharing with respect to IT and integrated systems. These successful strategies have enabled them to enter the market at incredible speed (González and Chacón, 2014; Jeacle, 2015; Mo, 2015). Information enables the coordination of production activities, logistics and retailing, as shown by Bruce and Daly (2011) and Aftab et al. (2018), which has also been supported in this study.

The findings are a clear indicator that respondents from Alpha Clothing view supplier relationships as a key driver to a successful FF strategy. This finding validates the importance of the findings from previous research such as Doyle et al. (2006) and Moon et al. (2017).

5.2   Objective 2: "To identify the perceived barriers to FF in SA"

5.2.1   Previous research

For businesses seeking to implement an FF strategy in the SA retail marketplace, it is important to understand what the potential barriers are, and to seek ways to minimise any risks to successful implementation. From the literature, key barriers were identified as product and social responsibility. Some factors of concern included the nature of the FF product, due to a short life cycle. As a result, products may not be made of good material nor to a good manufacturing quality (Linden, 2016; Hellström, 2017; Wren, 2022).

Issues relating to product have a spill over effect into customer social responsibility, as over the years, these FF products fill up landfills and pollute the environment. Another issue was the traceability of where these products are manufactured. Globalisation has opened up supply chains and, as a result, sourcing can be done anywhere in the world. There are concerns about possible exploitation of less developed countries (LDC's) by FF, given that it thrives on low cost production requirements (Cook and Yurchisin, 2017; Khan et al., 2017).

5.2.2   Current findings

5.2.2.1 Product issues

Product issues were identified as one of the barriers to the adoption of FF. The majority of responses agreed that FF products lack quality, deteriorate quickly, and are offered at low prices, as identified by Perry and Wood (2018). The combined level of agreement ranged from 35.6 percent to 80.9 percent. The statement with the highest combined level of disagreement (39.7 percent) was that styles are 'knock offs' of major brands, which is interesting as previous research found consumers were aware of the inauthenticity of products

buy this was did not hinder their FF consumption (Kim et al., 2013). This suggests SA consumers may not be as knowledgeable about FF as international consumers.

5.2.2.2 Social responsibility

All retailers have a great responsibility to ensure that they trade in fair and ethical ways and that the environments in which they trade are not negatively impacted by their trading methods. Regarding social responsibility, this section received high combined acceptance on all statements. Respondents agreed that FF is wasteful, stimulates excessive consumption, and exploits labour in LDCs. The combined acceptance level of agreement was between 39.7 percent and 83.9 percent. A total sum of 67.6 percent of respondents agreed it is not easy to monitor ethical misconduct, which supports Perry and Wood's (2018) findings. However, contradictory to that, only 39.7 percent of respondents agreed that there is a need to comply with policies related to ethical trading in the supply chain as identified by Harris et al. (2016).

5.2.3 Conclusion

It is imperative for retailers to understand the obstacles to FF strategy. This study's findings supported previous research that social responsibility is a crucial factor that cannot be ignored by businesses in today's economies (Kim et al., 2013; Khurana and Ricchetti, 2016; Cook and Yurchisin, 2017). This previous research also highlighted product issues as being a barrier to successful FF, but it is interesting to note that previous research identified that consumers did not stop consuming FF despite recognizing bad quality (Cook and Yurchisin, 2017). This may indicate that the low prices and up-to-date fashions may override the importance of consumers' perceptions of poor quality or ethical misconduct. However, as implied above, it would be a brave retailer who overlooked the growing disquiet about unethical manufacturing and trading policies.

6. Conclusions

6.1 Implications of the Findings

This study has presented some noteworthy implications for SA clothing retailers and for retail academics. The practical and theoretical implications of the research are discussed below.

6.1.1 Retailer Implications

Research investigations are crucial for the retail industry to enable determination of drivers and implementation of FF in the SA clothing retail sector. Little research has been conducted in SA on the FF strategy. As a result, this study helps to close the knowledge gap between SC strategies, FF and retail operations. South African retailers need to keep up with the rapid changes that take place in the global retail environment. Trade is no longer limited to domestic markets and consumption is not limited by borders, as consumers can shop electronically anywhere in the world from the comfort of their homes. This justifies how important it is to keep current with business strategies that promote company success. The FF strategy has been a major success for industry giants such as Zara and HandM. Therefore, SA retailers should incorporate the principals discussed in this study, into their company strategies. Retailers can also make use of this research to find mitigation measures for the barriers to successful implementation of an FF strategy.

6.1.2 Academic Implications

This study has successfully contributed to knowledge about FF in the SA clothing retail industry. The study provides a framework which identifies the perceived drivers of, and barriers to, the implementation of FF in the SA clothing retail industry, as per the perceptions of managers and employees in a FF supply chain. Since this is one of only a very few studies researching the FF strategy in SA, and the only one looking at the problem from the retailer's perspective, it will hopefully lay a foundation for further scholarly research into greater understanding of such clothing retail strategies.

6.2 Limitations

Like most research, this study has limitations which readers need to be aware of. First, the study was confined to the South African clothing retail industry, in the form of a case study with only one retailer. Second, the sample size of 101 respondents was small and had the disadvantages of all small samples. Third, the sample was essentially self-selected via a self-completion questionnaire, and so might be biased towards those with a propensity to questionnaire completion, and therefore may not be sufficiently representative of the population. Fourth, a newly constructed questionnaire was used and as indicated in Section 4.2, it may not be totally reliable. In future research the questions for sub-constructs with composite reliability below the required threshold, as shown in Table 6, should be redesigned, and refined. And finally, the sample had insufficient responses from some departments, even after personal communication and follow up by the researchers and so may not have provided a perfectly balanced representation of the population.

6.3   Recommendations for Future Research

This study focused on only a single South African retailer, so a wider study including more SA retailers should be conducted to provide a larger sample. A qualitative study to provide deeper knowledge of consumers' understanding of the FF concept is required, for example, to examine reasons for the contradiction between the supported monitoring of ethical misconduct and the low need to comply with ethical trading policies, or the consumers' awareness and understanding (or lack thereof) of quality, authenticity and the unethical nature of which FF is accused. Since this study focused on the drivers and barriers to implementation of FF, future research could also include individual, more in-depth, research into each driver and barrier. Finally, further business-oriented research could be conducted into what aspects of the FF implementation process are essential in the SA retail industry.

6.4 Conclusion

The aim of this study was to identify what the drivers and barriers are to employing an FF strategy in the South African retail industry. The study confirmed the drivers identified by the literature, namely information and supplier relationships, are also the major drivers of FF in the SA retail sector. It is important to note that the respondents to the study also agreed with the literature findings that the identified barriers are a problem. Retailers need to find solutions to these problems, such as unethical misconduct, labour exploitation and the wasteful nature of products. The SA FF retailers must consider that, since the SA market is still a developing market, they can be major contributors to the improvement of this strategy if they find ways to improve on the barriers identified. This is important because a FF strategy is a major promoter of local production.

In summary, it can be said that the research contributed to a better understanding of the drivers of, and barriers to, the implementation of FF in the SA retail industry as intended. Since FF retailers have better performance than traditional retailers in terms of shorter lead times, local sourcing and lower inventories, the results can be used to further improve the implementation of FF. Whilst FF is appealing to retailers, the barriers are disturbing, as there is a worldwide concern about FF practices and the impact it has in terms of society and the environment. The study therefore contributed knowledge about, and understanding of, the drivers of, and barriers to, FF is the SA clothing retail space, and hopefully will lead to a more efficient and socially responsible FF retail sector.

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