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FASHION RETAIL STRATEGIES IN-STORE DESIGN AND PLANNING: THE CASE OF SOUTH AFRICA*

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Abstract. The study followed a consumer-centred approach in investigating the subject of visual merchandising in the South African fashion retail industry holistically. Inspired by the vision of 'Fashionomics' as a potential driver of economic growth, the primary research objective was to synthesise key visual merchandising elements to drive retail strategies in-store design and planning in the broader South African fashion retail market. This research study adopted a mixed-methods approach, analysing the data through directed content and factor analysis. This research study aims to reinvigorate South African fashion retail by targeting key visual merchandising elements, which South African fashion retailers can use as strategic tools. The key elements were determined from the consumer's perspective; hence, fashion retailers' strategies may become more effective. Fashion retailers can differentiate themselves through the in-store environment created through unique visual merchandising strategy based on the identified critical elements and using them to gain a competitive advantage. The specified visual merchandising elements represent functions, activities, and business practices consumers value and demand. They reveal what consumers could see as a benefit to their relationship with the retailer. It was found that fashion retailers should implement good housekeeping – cleanliness and neatness, train customer-centric staff, and pay attention to fitting rooms, amongst a range of other visual merchandising elements in their retail strategies. As these three elements appear significant according to consumers, retailers will likely benefit the most by focusing on them.

Keywords: visual merchandising; South African retail industry; fashion; retail strategy; store design; store planning; key elements; consumers; merchandising; store atmosphere.

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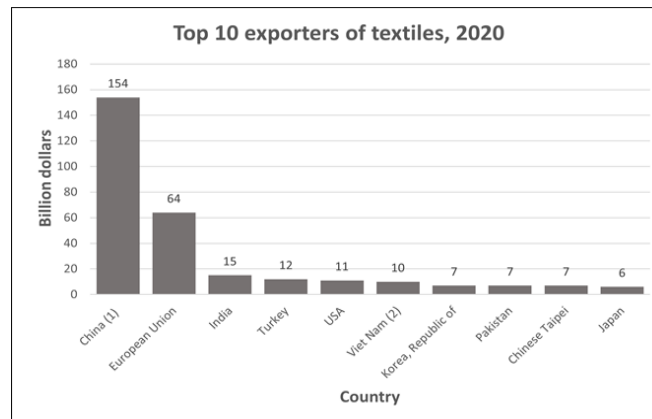
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1. Introduction

Fashionomics (or ‘economics of fashion’) is a Pan-African programme initiated by the African Development Bank (AfDB) to support the development of the textile and fashion industry with a focus on MSMEs (AfDB, 2016; Dekker & Hollander, 2017; Dakora, 2019; Clark, 2020). The initiative provides African entrepreneurs operating in the fashion and textile sector with a platform to create and grow their businesses with a particular focus on women and the youth (Business Trumpet, 2020).

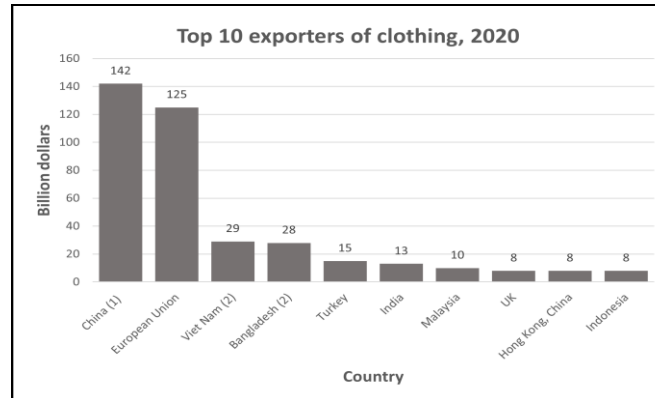
The AfDB Fashionomics initiative – see <http://www.fashionomicsafrica.org> – was spurred by the realisation that the fashion industry was the second largest employer after agriculture in most developing countries, yet in Africa, the industry remained largely an untapped sector. This insight impelled the AfDB to establish a platform that ensured the development and support of the sector, given its potential to become a significant contributor to economic growth and job creation in African nations. The global fashion industry is worth about USD 1.3 trillion; in Sub-Sahara Africa, it is estimated to be worth USD 31 billion (Yamama, 2021). Considering that the global GDP was estimated to be worth USD 87.3 trillion in 2019, Africa's GDP of USD 2.5 trillion for the same period represents 2.9% of the worldwide GDP (International Monetary Fund 2020). Africa's fashion sector, however, represents only 2.4% of the worldwide total (i.e. USD 31bn/USD 1300bn). These figures indicate that Africa's fashion sector, as a share of the worldwide fashion economy, lags behind Africa's global GDP.

Research by the Organisation for Economic Cooperation and Development (2021:33) suggests that the textile and fashion apparel sector can play an important role in emerging markets by creating jobs and spurring further industrialisation, especially the light industry, ideally suited to these emerging markets. Suppose one looks at the top textile-producing countries (Figure 1) and the top 10 clothing exporting (Figure 2). In that case, it is clear (a) the several leading producers are from emerging markets, and (b) no serious African competitors are on this list. As the fashion sector has the potential for easy entry for individuals and small businesses, as well as the potential for broader employment and as a driver for reindustrialisation, the AfDB's efforts to kickstart the ailing fashion sector in Africa make sense. Developing the textile and fashion apparel sector could create over 400 000 new jobs and export growth from USD 3 billion to USD 5 billion by 2025 (AfDB, 2016).



*Note: (1) Includes significant shipments through processing zones; (2) Secretariat estimates

Figure 1. Top 10 Largest Textile Producing Countries 2020
Source: Adapted from World Trade Organization (2022, p. 77)



*Note: (1) Includes significant shipments through processing zones; (2) Secretariat estimates

Figure 2. Top 10 exporters of clothing in 2020

Source: Adapted from World Trade Organization (2022, p. 78)

The abovementioned economic backdrop to the African fashion sector justifies the study that focuses on synthesising key visual merchandising elements to drive retail strategies in-store design and planning. This study is focused on the South African fashion apparel sector (referred to as 'fashion' in the remainder of this article). Still, the lessons learnt may be helpful for the rest of Africa.

2. Visual Merchandising

In defining and comprehending visual merchandising, it is necessary to understand the origin and development of the concept. The concept of visual merchandising developed from two terms – 'visual' and 'merchandising'. The term 'visual' refers to an action relating to or using one's sight or 'seeing' (Cambridge, 2022), while 'merchandising' is the retailer's attempt to present the correct quantity of the right merchandise in the proper place at the correct time, while meeting the company's financial objectives (Hefer, 2017). Various definitions have combined these two terms over the years, some of which have become prominent definitions of visual merchandising (Levy & Weitz, 2016; Basu, Paul & Singh, 2022, Pellegrini, 2020). All the efforts have the same aim: to arrange a store and its merchandise to draw the attention of a possible consumer, provide the consumers with a pleasing shopping environment, and increase sales. From product merchandising and store layout to background music, housekeeping, the type of lighting used, pictures, posters and light boxes, signage and graphics, window displays and props, the walls and the use of furniture and fixtures, all these elements and their visual arrangement form part of visual merchandising (Shanfar 2016).

Key elements in visual merchandising

Regardless of the significant amount of attention given to the critical success factor approach by academics and specialists (Borman & Janssen, 2013) the current literature needs to place critical elements in the context of visual merchandising. The present study thus aims to develop essential elements for visual merchandising from the consumers' perspectives.

Rockard defined vital elements in the 1970s as those essential things that must go well to ensure that an organisation performs well and attains future success (Freund, 1988). It combines vital fundamentals to accomplish one or more sought-after business goals. The critical element concept has evolved to include competitive factors as well. Key elements must adhere to specific criteria (Freund, 1988). They are:

- critical to achieving overall corporate goals and objectives;
- measurable and controllable by the organisation;

- relatively few – not everything can be vital;
- expressed as things that must be done;
- applicable to all companies in the industry with similar objectives and strategies (for example, all fashion retail stores); and
- hierarchical in nature – some critical success factors will pertain to the overall company, while others will be more narrowly focused on one functional area.

The critical visual merchandising elements identified by this study can ultimately determine or influence the success of a visual merchandising division of a fashion retailer. Key visual merchandising elements are the 'must achieve' factors. The accent on achievement underlines that critical success factors are action-oriented (Long, 2022). They are not business objectives or aims but a mixture of activities and procedures designed to support the success of the desired outcomes specified by a retailer's objectives and goals. In turn, the identified vital visual merchandising elements will be action-able and, to some extent, controllable by the retailers (Cooper, 2021).

As is evident from the above sections, the developing South African fashion retail industry has much to gain from identifying key visual merchandising elements. The section below expands on this study's contribution by presenting these key visual merchandising elements.

3. Significance of the study

The purpose of a retail store is to display and sell merchandise to consumers. Therefore, the retail spaces must be designed to encourage an enjoyable and hassle-free shopping experience. Planning and creating a retail store space that is both pleasurable for consumers and functional for the retailer and that also fits the image or brand of the retailer is a challenge that many companies face.

Searches on diverse academic databases such as EBSCOHost, Google Scholar, Emerald and ScienceDirect produced various articles, books, and information on visual merchandising. However, the databases needed to generate literature concerning the focus of this study, namely key visual merchandising elements for fashion retail stores in a South African context. The existing literature (predominantly European and American) merely discusses and examines various visual merchandising elements, and, how these elements influence consumer behaviour and perceptions.

This study attempts to fill a void in the literature by synthesising key visual merchandising elements that can be used as a strategic tool to drive retail strategies for in-store design and planning in South African fashion retail stores. These elements have been synthesised by consumers, combining essential visual merchandising elements that could be used in-store to affect the consumer's shopping experience favourably and, ultimately, generate extra sales.

A review of the contemporary literature reveals that it needs to emphasise the priority of the elements in the context of visual merchandising. The elements of visual merchandising have never been tested in terms of their level of importance in the minds of consumers. By including the consumers' inputs regarding the significance level of the various visual merchandising elements, consumers become a dimension within fashion retailers' visual merchandising skills. Fashion retailers could use the identified key features to detect what is essential and what would keep consumers satisfied regarding store design to optimise their retail space using the correct visual merchandising elements.

Fashion retailers could include the critical visual merchandising elements in their current retail strategies to develop new store designs or to improve their contemporary store designs with an improved visual

merchandising proficiency, to enhance their brand image and to improve their customer satisfaction levels, and subsequently use these efforts as a competitive advantage. All this will work towards improving their sales, as consumers are more likely to return for repeat purchases if the shopping environment is favourable. Currently, retailers differentiate themselves according to several factors, including, but not limited to, product quality, brand image, product price and style (Cant, 2021). However, fashion retailers can also differentiate themselves from their competition through the in-store environment created by visual merchandising by optimising their visual merchandising strategy based on the critical elements identified and using this strategy as a competitive advantage.

4. The South African retail sector

The South African retail industry is the largest in the sub-Saharan region and is ranked as one of the largest retail markets in the world (PWC, 2016). The retail industry's significant economic contribution offers more employment opportunities than many other sectors, specifically today's youth. The sales in 2020 for the retail sector Table 1 below illustrates the composition of retail trade sales by type of retailer for the second quarter of 2022.

The clothing retail industry makes up the second largest % of retail sales is 15.7. Retail trade sales increased by 5.2% in the three months ended June 2022 compared with the three months ended June 2021. According to Statistics South Africa (2022), the main contributors to this increase were retailers in food and beverages, general dealers, pharmaceuticals and health products, textiles, clothing, footwear, leather goods, and household furniture and appliances.

Table 1. Composition of retail trade sales at current prices for April-June 2022

Type of retailer	Apr-Jun 2021 (R million)	Weight	Apr-Jun 2022 (R million)	% change between Apr- Jun 2021 and Apr-Jun 2022	Contribution (% points) to the total % change
General dealers	131 413	46,4	140 517	6,9	3,2
Food, beverages and tobacco in specialised stores	22 139	7,8	23 917	8,0	0,6
Pharmaceuticals and medical goods, cosmetics and toiletries	22 893	8,1	24 228	5,8	0,5
Textiles, clothing, footwear and leather goods	44 367	15,7	46 591	5,0	0,8
Household furniture, appliances and equipment	12 492	4,4	12 973	3,9	0,2
Hardware, paint and glass	23 683	8,4	22 931	-3,2	-0,3
All other retailers	26 144	9,2	26 832	2,6	0,2
Total	283 131	100	297 992	5,2	5,2

Source: Adapted from Statistics South Africa (2022)

Statistics show that fashion retailers have a significant impact on the retail industry and that it is responsible for a substantial share of the growth of the South African retail sector (Statistics South Africa, 2022). Therefore, the fashion retail industry must continue to find innovative ways to develop and stay current.

As the study focuses on fashion retailers, it is necessary to understand what fashion retailing is clearly. Since a retailer is defined as a business that sells goods to a consumer for their personal use, it can be inferred that a fashion retailer is a business that sells clothing and clothing-related items directly to the consumer for their personal use. These products could include clothing, shoes, hair, make-up, and accessories (Diamond, Diamond & Litt, 2015).

Due to the large number of fashion retailers in South Africa and the fact that retailers are fighting for a share of the consumer's wallet, the competition in the fashion retail industry is intense. Brick-and-mortar retailers are also facing competition from online fashion retailing, which has grown positively over the past few years (PWC, 2016). Even though online retailing has shown great potential, factors such as being able to feel and touch the clothes and trying the clothes in-store draw customers back to the physical stores. Because of this, all retailers strive to entice consumers to enter their stores by having the most exciting and visually appealing retail environments, which cultivate an atmosphere where consumers can shop effortlessly for clothing and clothing-related items in different colours, fabrics, styles, and values.

To achieve visually appealing retail environments, fashion retailers use visual merchandising (which is one of retailing's crucial components). However, retailers often need help regarding this aspect of their retail strategies (Levy & Weitz, 2016). For this reason, this study offers retailers key visual merchandising elements to incorporate into their retail plans. The value of crucial visual merchandising elements lies in taking into account consumers' views, which enables retailers to anticipate what the consumers would like to see in their stores.

5. Primary Objective

The primary research objective of the study was to synthesise key visual merchandising elements from a customer perspective to drive retail strategies for in-store design and planning in the broader South African fashion retail market.

6. Research Method

This research study adopted a pragmatic paradigm and followed a mixed-methods approach. Therefore, the research design was divided into two parts. The first part followed an exploratory qualitative research design, drawing on in-depth interviews with the three leading retailers in South Africa. These individuals were very experienced, and their expert opinion was deemed valuable in identifying any visual merchandising elements/items missing from the list. They were not required to remove any elements from the original list, as it was felt that the longer the list, the more detailed it would be for the second and third research methods. After that, two focus groups were held with 8 and 6 participants (consumers), respectively. The participants were asked to examine and discuss the visual merchandising elements synthesised from the literature. Throughout the discussion, consumers could add additional visual merchandising elements/items they felt should have been mentioned on the list. Again, participants were prohibited from removing any elements/articles from the original list.

Once research methods 1 and 2 had been conducted, the list of visual merchandising items totalled 176 (this included the visual merchandising items synthesised from the literature and insight from retailers and consumers).

A thorough literature review was conducted to identify and examine all known visual merchandising elements as a starting point in developing the final research instrument (used in research method 4). These elements were compiled into a list that included the visual merchandising elements and individual visual merchandising items that make up the element for research methods 1 and 2.

Because the length of an online questionnaire is positively correlated with drop-out rates and negatively correlated with the number of responses (Rocco, 2019), the next step in the research process was to reduce the number of elements to be tested. To this end, a word-sorting exercise and a pilot study were used. The word-sorting activity was conducted to compare, contrast and sort items according to the visual merchandising

elements they were linked to and, most importantly, eliminate duplicate and ambiguous items. A subject matter expert was used for this exercise. This step thus ensured that the things adequately represented the underlying theoretical content within each element. After a word-sorting exercise, the elements to be tested were reduced to 142 from the initial 176 items.

The word-sort exercise was followed by a pilot survey using an online questionnaire. Forty-five respondents completed this survey. The initial 142 visual merchandising items were formulated into Likert-scale questions and administered to the respondents' pilot sample. These respondents were required to rate the importance of each visual merchandising item on a five-point Likert scale ranging from 1=Unimportant to 5=Very important. Based on the respondents' ratings, an item mean was calculated for each item. Following this process, the 80 items with the highest mean score were selected for preliminary inclusion in the questionnaire. In addition to using the highest mean scores of the items as an inclusion criterion, a further inclusion criterion was related to the mean score of that item being higher than the average of '3'.

The final step in the item reduction process involved a further review by the same subject matter expert used before to ensure that sufficient domain content for each element was retained. The item reduction process yielded a final list of 81 visual merchandising items. The abovementioned process resulted in a definitive list of questions deemed short enough and sufficient to elicit the required information while minimising respondent burden.

Finally, an online survey was used to send a questionnaire to 1 057 respondents. This sample was selected randomly from more than 40 000. As the precise measurement of key visual merchandising elements in terms of importance was considered necessary, quantitative research was deemed the best method.

Data analysis and results

The visual merchandising managers of three of the largest retailers in the country, with a combined turnover of approximately R150 billion in 2021, were invited for in-depth interviews. All three senior executives were female between the ages of 40 and 55. Regarding the participants in the three focus groups, 25 participants took part, 44 per cent male and 56 per cent female, all between the ages of 18 and 55. Detailed demographics of respondents are provided in Appendix A.

The data from the qualitative part of the empirical research was analysed employing directed content analysis. In contrast, the data from both the pilot and complete surveys were analysed using SPSS. In analysing the survey data, the data was first cleaned and coding, with the second stage focusing on the analyses and interpretation of the results. Both descriptive statistics were compiled, standard factor analysis using the principal axis factoring method and reliability analyses were conducted on the data. The Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy and Bartlett's test of sphericity were utilised to determine the factorability of the data. Both the KMO measure (.960) and Bartlett's test of sphericity $\chi^2(3240) = 47786.71$, $p < .01$ suggested sufficient intercorrelation and common variance within the data conduct a factor analysis. The initial factor analysis of the data suggested the extraction of 16 factors (visual merchandising elements) using the Kaiser criterion (eigenvalues greater than 1). This factor solution, however, yielded several factors with only 2 or 3 significant primary loadings. This solution would thus not produce stable characteristics. Further analyses were conducted to find a better factor solution to fit the data. The scree plot was utilised to further assist in identifying the number of factors (visual merchandising elements) to extract. Finally, the a priori criterion was also used to determine the number of factors (visual merchandising elements) to remove, pointing to 11 factors as shown in Table 2 shows that all the factors have good internal consistency and reliability with all the Cronbach's alpha coefficients > 0.6 (Shrestha, 2021).

Table 2. Factors identified from the research and corresponding Cronbach's alpha

Factors*	Items	Cronbach's alpha
Factor 1: Housekeeping – cleanliness and neatness	32; 34; 39; 40; 41; 42; 43; 44	.919
Factor 2: Window displays and focal points	37; 60; 61; 62; 63; 64; 66; 67; 68; 69; 71	.912
Factor 3: Store design – comfort and convenience	8; 11; 12; 15; 16; 17	.757
Factor 4: Fitting rooms	72; 73; 74; 75; 76; 77	.858
Factor 5: Store design – ease of access and organisation	1; 2; 3; 4; 5; 6; 7; 14	.819
Factor 6: Signage and graphics	19; 20; 21; 22; 23; 24; 25; 26	.844
Factor 7: Mannequins	55; 56; 57; 58; 59	.883
Factor 8: Merchandise organisation	45; 47; 48; 49	.720
Factor 9: Atmospherics	29; 30; 31; 38	.721
Factor 10: Fixtures	50; 51; 52; 53	.798
Factor 11: Staff	78; 79; 80; 81	.797

*The factor naming was done together with the review expert to select a name descriptive of the item in question

Table 3 compares the subjective rankings of the various critical visual merchandising elements according to perceived importance and the average percentage of total respondents' scores for each component.

Table 3. Comparison of rankings according to perceived importance versus extracted factor scores

Rank	Ranking by respondents	Rank by average % (elements as in 81 items)	Rank by average % (elements according to extracted factors)
1	Staff	Staff	Housekeeping – cleanliness and neatness
2	Store design	Fitting rooms	Staff
3	Housekeeping	Housekeeping	Fitting rooms
4	Atmospherics	Window displays	Store design – ease of access and organisation
5	Fitting rooms	Signage and graphics *	Merchandise organisation
6	Signage	Mannequins	Signage and graphics
7	Window displays	Focal points	Mannequins
8	Graphics	Atmospherics	Window displays and focal points
9	Fixtures	Store design	Fixtures
10	Focal points	Fixtures	Atmospherics
11	Mannequins		Store design – comfort and convenience

* Signage and graphics were combined in research method 3

The results revealed that certain visual merchandising elements were perceived as more important than others. We discuss the findings below.

7. Discussion of findings

The in-depth interviews and the consumer focus groups identified four new visual merchandising elements (elements that should have been covered in the literature reviewed). They are as follows:

The pay points are the areas where consumers pay for goods. Consumers suggested that they would like multiple pay points per department located at different places, not just in specific ones.

Fitting rooms are inside a retail store where consumers can try on clothing in private before deciding whether to purchase it. The analysis indicated that the items that made up the second new element revolved around the furniture in the fitting room, the design, style and size, its location, and the type of flooring used. Consumers specified that the fitting rooms should be large enough to be able to move around comfortably and that they

should be fitted with large mirrors. They further discussed the different floor types used within fitting rooms, furniture, and information conveyed through signage and graphics.

Staff is a human factor and includes the people that the retailer employs. The items that made up this specific element revolved around the staff member's skill, their training in visual merchandising to replenish and maintain where necessary, and staff hygiene. The research revealed that the staff should correspond to the store's image. The personal hygiene of staff and their friendliness are also paramount.

A mirror is a smooth surface that forms images by reflection. The content analysis indicated that the items included in this new element revolved around the placement of mirrors in different departments and the size of mirrors used in the store.

The 11 elements identified by the factor analysis are illustrated in Figure 3 below and are ranked in order of importance, together with their top two rated items, as indicated by consumers.

In order of importance, housekeeping – cleanliness and neatness is the essential element out of all the visual merchandising elements, followed by staff, fitting rooms, store design – ease of access and organisation, merchandise organisation, signage and graphics, mannequins, window displays and focal points, fixtures, atmospherics, and store design – comfort and convenience.

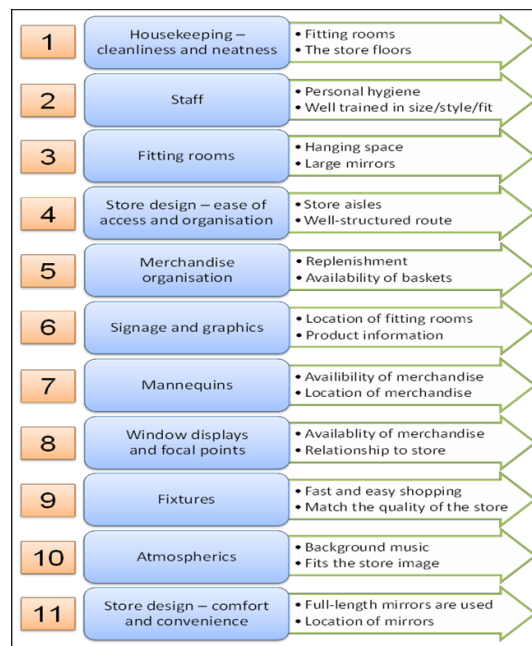


Figure 3. Visual merchandising elements ranked per order of importance

Source: Authors' compilation

It was evident from the results that certain visual merchandising elements were perceived as more important than others by consumers. Therefore, based on these results, the elements were divided into three distinct groups, namely:

1. Key visual merchandising elements - housekeeping, staff, and fitting rooms
2. Significant visual merchandising elements - store design, merchandise organisation, and signage and graphics);
3. Less-important visual merchandising elements (fixtures, atmospherics, and store design – comfort and convenience). Each group is discussed in detail below.

7.1 *Group 1: The critical visual merchandising elements*

Three elements in this group are seen as crucial to the success of retailers and ranked above the 80th percentile in the result. They are discussed below:

- *Element 1: Housekeeping – cleanliness and neatness*

This element was ranked the most critical visual merchandising element by consumers. Although the literature discusses housekeeping as a subdivision of atmospherics, based on these findings, it is strongly recommended that housekeeping not only be seen as an element on its own but also receive the most attention.

According to Smith (2019), housekeeping is an umbrella term in retailing to indicate that the floors have been cleaned, the carpets are vacuumed, and the displays and merchandise are kept neat and organised. However, the empirical study showed that housekeeping includes more than just the above. It is therefore recommended that the element Housekeeping – cleanliness and neatness – further refer to the cleanliness and working order of the retail store, as well as the cleanliness of the baskets/trolleys, the fitting rooms, fixtures, and store floors.

Although the literature suggests that housekeeping often goes undetected by the consumer, consumers are more likely to notice it when it is not satisfactory. Housekeeping and cleanliness start outside the store with a clean and well-maintained store exterior that is attractive and free from clutter. The overall impression that a fashion retailer creates can easily be ruined if the cleanliness and neatness of a store do not complement this image. It is recommended that fashion retailers implement housekeeping policies and procedures as part of their retail strategies. Therefore, an essential part of a retailer's everyday visual merchandising management should be housekeeping.

As the highest ranked item and therefore the most critical item under housekeeping – cleanliness and neatness, fitting rooms should be kept clean and tidy throughout the day, focusing on the cleanliness and neatness of the floors. Attention should also be given to the merchandise left behind in the fitting room by previous customers, ensuring that all merchandise is removed and a clean and neat fitting room is made available for the next customer. Store floors should always be kept clean and tidy as the second highest ranked item and therefore second to the essential item. Therefore, no matter the type of surface (wood, vinyl, cement, tiled, etc.), all floor areas should be cleaned daily with fresh water and cleaning materials, ensuring that a 'wet mop smell' is not present once finished. Further recommendations concerning this element of housekeeping are the following:

- Staff should receive proper training in housekeeping standards, as discussed in the following points.
- All carpeted areas should be vacuumed daily.
- Not only should baskets/trolleys be placed throughout the store for easy access by consumers, but they must be spotless, especially as consumers are going to put clothing items in them.
- Stores should ensure proper ventilation throughout the store, providing enough clean air to the store. This can be obtained by either natural or mechanical means. This will ensure that stale, overheated and polluted air is removed from the store and fresh air is circulated through, assisting with a natural clean smell.

- All store areas, including the counters and points of sale, should be dusted daily and kept clean. This includes the store windows.
- Rubbish bins should be emptied and cleaned – after hours – not in the presence of consumers.
- The displays should be kept clean and tidy throughout the day, ensuring that customers are met by a 'fresh' store and not just early mornings. For example, stores should be 'opened' three times a day – in the morning, in the early afternoon and again in the late afternoon – ensuring that even customers entering over lunchtime or late afternoons also get a 'just opened' store.
- Fixtures should be checked to ensure they are in good working order, and maintenance should be done as soon as possible.

- *Element 2: Staff*

This element was ranked the second most crucial visual merchandising element by consumers. 'Staff' are generally not mentioned in the literature as an optical merchandising element. However, staff were seen as necessary by the retailer representatives in the study and the consumers. The team element is, therefore, a brand-new visual merchandising element fashioned from empirical research.

Most customers pointed out that the staff are the business and that they are one of the first things noticed in a store. Therefore, it is understandable why a team should form part of a store's visual merchandising strategy. Staff dress and demeanour should fit the store's image, and their hygiene should be of a high standard. The study findings suggest that the staff should be well trained on two fronts: firstly, in assisting the consumer in making size, style and fit suggestions, and secondly, in being able to replenish and maintain the merchandising and displays where necessary.

The sales staff is visible to consumers. They can add value to the visual merchandising proficiency of a store. Even though most stores have dedicated optical merchandising staff to look after the visual merchandising of a store, it is highly recommended that retailers train sales staff in the art of visual merchandising so that they have the confidence to make visual merchandising decisions, for example, to replenish and maintain visual displays. Therefore, sales staff should be included in the store's visual merchandising strategy. The sales staff in the physical implementation of the visual merchandising strategy and that are aware of the store's visual merchandising strategy could feel that they are adding value to the store. This could assist sales if sales staff can fulfil merchandising tasks on a slow day, especially when visual merchandising staff are outside the store. This could help fashion retailers with the following:

- Ensuring the store is visually attractive throughout the day by replenishing displays, dressing mannequins, and guaranteeing the merchandise on display is available in-store.
- Ensuring visual consistency across the store.
- Communicating product attributes, qualities and selling points, building awareness and expertise.

Staff are the actual sellers; if they need to be more engaging and help understand the product, any visual merchandising strategy in place will be instrumental. Consequently, by upskilling staff and making sure that they can maintain the visual merchandising strategy that was put in place, they will be skilled enough to see that a particular item on display or in the window has sold out and to find a suitable substitute (that relates to the current visual theme in the store) in its place. It is recommended that fashion retailers include staff in their retail strategies for store design and planning.

- *Element 3: Fitting rooms*

Visual merchandising is another element that must be mentioned in the contemporary literature. Retailers and consumers unanimously agree that fitting rooms should be an element of visual merchandising. Therefore, the study suggests this item is a brand-new optical merchandising element created from empirical research.

Interestingly, even though fitting rooms are an element of their own and rated third highest, the cleanliness of the fitting rooms was highlighted in the detail of housekeeping – cleanliness and neatness and was ranked the most important in this element. This further emphasises the importance of fitting rooms as part of a fashion retailer's retail strategy for store design and planning. Shoppers regularly try on the fashion they want to purchase to make buying decisions. It was apparent in the focus group discussion that a pleasing fitting room environment could increase the likelihood that consumers will use the fitting room, increasing the probability of purchasing. Suppose consumers make their purchase decisions in the fitting room. In that case, this is more profitable for the retailer and more efficient and enjoyable for the customers, which could build customer loyalty. It is, therefore, in the retailer's best interest to invest in the quality of the total fitting room experience. It is recommended that fashion retailers embrace and take advantage of this selling opportunity and make their appropriate room environments as pleasing as possible to consumers by focusing on the items within this element.

The items within the element of fitting rooms solely relate to the layout, setup and size of the in-store fitting rooms, the furniture used in the fitting room, and the location of the fitting rooms within the store. Regarding the visual merchandising element of fitting rooms, the most critical item is the amount of hanging space available in the fitting room. It is therefore highly recommended that the fitting rooms be equipped with plenty of hanging space for consumers to hang their selected items while trying other ones on. Thus, the fitting room should be furnished and having hooks, pegs, and knobs for hangers. Shelf space is also handy if the items selected come on a different hanger. Furthermore, it is recommended that large mirrors be placed in the fitting room for fuller-figure consumers to view themselves – this item was rated as the second most important item. This item also emerged as the second most important in the male group.

Consumers mentioned that even though clothes look good and well made in the store, the fitting room could change the perception of the items being 'skanky' and 'cheap' due to a dirty fitting room. Consumers could walk into a new and trendy retail store, expecting a whole and impressive experience, but are taken into a different world when they enter the fitting room. To create a highly sought-after fitting room experience, the following is recommended:

- Allow enough floor space when designing a store to make the fitting rooms large enough for consumers to try on their chosen merchandise without feeling cramped; in other words, ensure that the area is large enough for consumers to move around the fitting room comfortably.
- Have the fitting rooms equipped with bright lighting.
- Furnish each fitting room with good furniture, such as a chair and ample hanging space.
- Have a fitting room in each store department, for example, a separate fitting room for males and females.

7.2 Group 2: Significant visual merchandising elements

The five elements in this group are seen as elements also worthy of attention, ranking between the 75th and 79th percentiles. Once again, there was a slight disparity between these elements, implying that they are all equally significant, albeit not as crucial as the first group of three elements. These elements are discussed below.

• *Element 4: Store design – ease of access and organisation*

This element is widely discussed in the literature. The item relates specifically to the ease of access within the store and the organisation of items within the store. This element also includes the aisles, how they manage the route through the store, and their neatness. A great store design offers the consumer a pleasant and productive shopping experience. The literature points to retail store design as incorporating a well-organised strategy to arrange a store in such a way as to enhance space and increase sales; therefore, it goes further than merely creating an attractive store with appealing displays. De Wet and Prinsloo (2021) posit that consumers not only

purchase the products the retailer sells; they also buy the whole retail experience created by the store design.

Even though this is not one of the key elements identified in the study, the items within this element are still significant regarding store design and layout. It is, however, recommended that fashion retailers focus mainly on the following, as these items were ranked the highest within the element:

- Fashion retailers should ensure the store's aisles are neatly organised and clutter-free. This will provide a clear pathway to the store, guiding the customer through the different departments. The proper path will further assist consumers in finding their way through the store, directing them to the merchandise they are searching for. Signage and graphics can indicate the location of fitting rooms in different departments.
- Furthermore, the aisles should be wide enough for consumers to move around comfortably, especially when pushing a trolley or a stroller/ pram.

- *Element 5: Merchandise organisation*

The item includes how the merchandise is displayed on the floor, for example, hanging or flat packed, the replenishment of sold merchandise, how shoes are displayed, and the availability of baskets throughout the store to carry inventory. Figure 1 illustrates the items ranked in terms of importance for the element of merchandise organisation.

Fashion retail stores should present their merchandise visually appealing to get the most benefit out of their selling space. The following are some recommendations that fashion retailers can implement to obtain optimum results in terms of organising their merchandise:

- Merchandise should be replenished throughout the day. As staff members replenish inventory, this item specifically ties in with the visual merchandising element of staff (as discussed earlier).
- Fashion retail stores should make baskets available throughout the store, in various locations, for consumers to carry around merchandise while shopping for more items, especially if they buy many things. It must be noted that this specific item ties in with one of the items in housekeeping – cleanliness and neatness, where it is indicated how important it is that the shopping baskets are clean. This increases the importance of this item.
- Merchandise should be appropriately classified before it is placed on the floor. The inventory must be organised in design, colour, category, etc. Through proper classification, fashion retailers can assist consumers in shopping quickly, finding their way through the store, browsing, and making additional sales.
- Planning space concerning merchandise placement should be done right away. Properly preparing the area to display merchandise will prevent unnecessary losses and shrinkage.

Keeping shelves and rails full by replenishing them once the product is sold out could enable a retailer to increase their sales and reduce stock carrying costs. Ensuring all required styles and sizes are available on the sales floor is important.

- *Element 6: Signage and graphics*

Another item stems from the literature. Only some people are literate, but photos and pictures are collectively more easily understood. According to Murray, Teller and Elms (2019), graphics and illustrations are a powerful way to convey a message to consumers, especially when combined with signage. Even though a picture is worth a thousand words, it is sometimes better when a message is read and seen. Signage is one of the best and least costly communication methods for consumers, particularly retail organisations, as signs account for many unplanned visits (Ebster & Garaus, 2011). Signs are often a consumer's first contact with a store.

It is recommended that signage and graphics be used as a communication tool to indicate the fitting rooms' location. It was noted that most consumers surveyed struggled to locate fitting rooms. It is further recommended

that in-store signage be used as an information tool to indicate sale items and communicate product information such as prices. These items within signage and graphics relate strongly to the visual merchandising element of store design – ease of access and organisation discussed earlier. Signage and graphics can direct customers through the store, helping them find the items they are searching for.

- *Element 7: Mannequins*

The element of mannequins includes the different types of dummies used in the store and how they are used to display the merchandise. Well-dressed figures make an impressive first impression of fashion. Forms work hard in retail stores as they have many tasks to fulfil. Among others, they are used to highlight the newest fashion in-store by displaying the latest trends in fashion and influencing the customers to purchase the items in question. Shoppers look to mannequins to learn to combine separates and accessories (Lindström, Berg, Nordfält, Roggeveen & Grewal 2016). According to Bell and Ternus (2012), a dummy may be a store's most valuable communication tool.

Regarding the visual merchandising element of mannequins, it is highly recommended that the merchandise displayed on the figure be available to purchase in-store. For example, if a specific item displayed on a mannequin has sold out in the store, the item should be removed from the dummy and replaced with a suitable alternative. The availability of advertised items was the essential remark concerning mannequins. Training is suggested for the team to make informed decisions regarding visual merchandising. It is further recommended that the merchandise be close to the mannequin on which it is featured. It will assist consumers in finding the merchandise they are looking for and direct them through the store.

- *Element 8: Window displays and focal points*

This item includes the themes, colours and timelines used for the different window displays and focal points. Window displays generally help retailers attract consumers' attention and invite them into the store to make unintentional visits (Oh & Petrie, 2012). Window displays that are more inventive are arguably better perceived by consumers in terms of the store's image (Saricam, Okur, Erdem, Akdag & Kilicci, 2018). Abidin and Aziz (2012) maintain that window displays act as stimuli to entice the customer to enter the store. Some fashion retailers spend vast amounts of money on creating works of art in their windows, while others keep their windows simple but effective.

To reap the most benefits out of the element of window displays and focal points, the following are recommended:

- Window displays must be carefully planned to ensure that the merchandise displayed in the window is available to purchase in the store. This item relates not only to the element of mannequins but also that of staff. As explained earlier, if a particular item displayed on a mannequin has sold out in the store, the item should be removed from the dummy and replaced with a suitable alternative.
- A retailer with storefront windows has one of the most recognised (and least costly) forms of promotion. Retailers can visually communicate the merchandise on offer to consumers. However, if the merchandise displayed in the window is unavailable, it could harm the consumers' impression of the retailer more than reasonably.
- Because sight is the most influential human sense, good visual merchandising displays can appeal to the consumer's cognitive and emotional feelings. As soon as the graphic shows have attracted consumers, retailers can further utilise the visual merchandising displays to keep the consumers in the store by directing them towards certain products.
- The window displays (the design, the theme, and the merchandise) must relate to what is seen in the store. Therefore, fashion retailers can increase the probability of making sales by understanding consumer perceptions of visual displays and determining what works and what does not.

Including store design – ease of access and organisation, merchandise organisation, signage and graphics, mannequins and window displays, and focal points in a retailer's retail strategy, in-store design and planning could be advantageous to a fashion retailer. Still, these elements are not as crucial as the recommended vital elements. However, it is recommended that if fashion retailers decide to implement any of the significant characteristics or already have them executed, they focus on the highest-rated items within each component, as discussed in the preceding sections. Concentrating on the highest-ranked things within each element will ensure that the retailers benefit from each aspect.

After the significant visual merchandising elements, the final three elements are classified as the less critical and discussed in the section below.

7.3 *Group 3: Lesser essential visual merchandising elements*

The last three elements (fixtures, atmospherics, and store design – comfort and convenience) proved less critical – ranking between the 63rd and 69th percentiles. Therefore, these three elements were found to have a lesser impact on consumers regarding visual merchandising. Consequently, it is recommended that fashion retailers spend less time and effort on these elements.

- *Element 9: Fixtures*

The items that constitute this element all relate to the different types of furniture used as fixtures and the placement of fixtures within the store. It is recommended that the fixtures used in the store be chosen with the consumers in mind; in other words, they should assist consumers with fast and easy shopping. Bell and Ternus (2012) posit that tables are one of the important fixtures to use in the retail industry due to their low profile. Tables are the perfect fixtures to greet customers at a department's entrance and introduce the merchandise. Furthermore, tables break up the floor space effectively, and consumers find it easy to browse and shop from tables (Morgan, 2008). They also allow consumers a clear sight of the rest of the merchandise in the store. Fixtures are the 'furniture' of a retail store, and without fixtures, a retailer cannot show inventory and generate sales. The theory highlights that the fixturing must be used to fit the retailer's image, which relates to the second most important item as rated by consumers, namely that the fixtures used in the store should match the quality of the clothing sold.

- *Element 10: Atmospherics*

Widely discussed in the literature, the concept of atmospherics involving conventional visual merchandising, such as fixtures and signage, might only sometimes be enough to get the overall atmosphere of a store right. Atmospherics refer to the design of the in-store environment through communicating with the consumers by employing senses such as lighting, colour, music and scent (Pegler, 2010). Retail atmospherics includes anything in the store that impacts how consumers perceive their environment (Grewal, Roggeveen, Puccinelli & Spence, 2014).

To create the right atmosphere in retail stores, retailers can use a variety of aural, visual and olfactory elements (Helmefalk & Hultén, 2017). Bell and Ternus (2012) explain that atmospherics that appeals to the five senses of humans can be 'layered' into the store to improve the shopping environment and build the store's brand image. Of all the various atmospheric elements proffered by participants, the items that remained for consumer testing revolved only around music and colour within the store interior. It is therefore recommended that fashion retailers focus on music and the use of colour throughout the store.

It is recommended that the music played in-store only be in the background and be just audible. A further recommendation is that the piece fit the image and brand of the store. This was also highlighted in the theory that

the music played should suit the store image, the style of the consumers, as well as the merchandise (Toldos, González & Motyka, 2019).

- *Element 11: Store design – comfort and convenience*

The content for the items within the last element relates to the identified visual merchandising element of store design, which was ranked as the least important out of all the elements. If the component is examined in greater depth, the item content pertains explicitly to the comfort and convenience of the store layout, and details ensure convenience and comfort. It also includes the use of mirrors, their size and location.

It is also posited that a proper floor layout is essential as a poor floor plan can lead to retail crowding, leading to too many consumers in the store simultaneously with too little space to move (Coskun, Gupta & Burnaz, 2020). A great deal of energy and effort goes into planning a retail store floor plan – the location of every product is cautiously planned and strategically placed to ensure effortless shopping and increase sales (Poloian, 2013).

In terms of store design – comfort and convenience, it is recommended that full-length mirrors be used throughout the store and that mirrors be visible in all store departments.

It is evident from Figure 3 that fixtures, atmospherics and store design – comfort and convenience seem to be of lesser importance, and, while not unimportant, retailers are advised to pay more attention to these visual merchandising elements seen as more important in the minds of customers. Retailing is about resource efficient resource utilisation, and therefore, it is recommended that retailers spend more critically on what is seen as necessary by customers. However, suppose a retailer uses these lesser important visual merchandising elements in their stores. In that case, attention should be given to the items that were ranked the highest within each aspect, as these items are the most critical items within the element in the minds of consumers.

8. Conclusion and key takeaway

The study highlights the importance of visual merchandising as a strategic tool in fashion retailing. Following the guidelines suggested above should contribute to retail success and the objectives underpinning Fashionomics – namely, economic growth in the fashion sector. Without proper attention to the elements identified, a retailer will not likely be as successful as it might otherwise be. Given the statistics and lack of traction of fashion retail in South Africa and Africa presented at the start of this article, it is recommended that South African fashion retailers pay careful attention to the visual merchandising elements identified.

The study provided a hierarchy of three levels (groups) of visualisation elements covering 11 elements ranging from the key, significant, to lesser critical elements. The elements in order of priority are (1) housekeeping, (2) staff, (3) fitting rooms, (4) ease of access and organisation, (5) merchandise organisation, (6) signage and graphics, (7) mannequins, (8) window displays and focal points, (9) fixtures, (10) atmospherics, and, finally, store design (comfort and convenience). Interestingly, the staff role was seen as part of the 'visual' offering of the store. However, it makes sense that a friendly, smiling, and helpful salesperson will majorly impact the customer, and all these positive signals are visual. Also, the importance of good housekeeping and clean and presentable fitting rooms will undoubtedly have gained even more traction with the lasting hygiene lessons learnt from the COVID-19 pandemic.

Although the study draws on senior managers' input in the country's three largest apparel firms as the initial source of essential visualisation items rather than on a broader range of firms, the information from the focus groups and the large-scale survey helped counterbalance this shortcoming. Further research could be put into testing the findings from this study amongst a broader range of apparel retailers in the country to confirm the conclusions of a supplier rather than buyer perspective. The scientific novelty of this study is founded on the

relative importance of certain visual merchandising elements over others. This relative importance of visual merchandising elements can be used by new entrants to the apparel market, allowing them to focus on those elements perceived as relatively more important, allowing new firms to gain more rapid traction in the marketplace.

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Appendix A

Demographics of main survey respondents

The table below provides an overview of the demographics of the survey sample of 1 057 respondents

Race	n	Percentage
African	177	16.7
White	681	64.4
Coloured	93	8.8
Indian	73	6.9
Asian	8	0.8
Other	25	2.4
Gender	n	Percentage
Male	535	50.6
Female	522	49.9
Age	n	Percentage
18 – 25	21	2
26 – 35	174	16.5
36 – 45	288	27.2
46 – 60	476	45
Older than 60	98	9.3
Employment status	n	Percentage
Employed	1 042	98.6
Unemployed	15	1.4
Monthly income	n	Percentage
Up to R10 000	36	3.4
R10 001 – R30 000	245	23.2
R30 001 – R60 000	340	32.2
R60 001 – R90 000	238	22.5
More than R90 000	198	18.7
Location	n	Percentage
Gauteng	725	68.6

Western Cape	161	15.2
KwaZulu-Natal	71	6.7
Mpumalanga	28	2.6
Eastern Cape	26	2.5
North West	20	1.9
Free State	17	1.6
Limpopo	6	0.6
Northern Cape	3	0.3

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