

Examining the Concept of Sustainability in Fashion Enterprises: A Case Study of the Nigerian Fashion Industry in Times of Uncertainties

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Abstract

The paper examines sustainability in fashion enterprises and how such businesses adapt to uncertainties. The PESTLE Analysis model has been deployed in appraising the impact of the COVID-19 pandemic, as an uncertainty, on fashion enterprises in Nigeria, and how the Nigerian fashion industry can be positioned towards a more sustainable future. Six fashion business owners with different specializations in various fields of fashion participated in the study. They are a textile merchant, a fashion brand influencer, a fashion stylist, a fashion design tutor, two fashion designers, and a policy elite. Relevant data was gathered through semi-structured interviews and analyzed through thematic analysis. The outcome of the study indicates that while the COVID-19 pandemic has had a significant impact on the fashion industry in Nigeria, the ability of the sector to regain momentum and move upward on the trajectory of growth post-Covid depends on critical stakeholders in the industry.

1. Introduction

Uncertainties in the business sector refer to a situation in which businesses are unable to determine the outcome or impact of an event on the performance of the business positively or negatively. Uncertainties are considered to be out of the control of such organizations, however, some businesses could ride the tide and become more innovative with structures and strategies leading to an excellent outcome [1]. The COVID-19 pandemic, as an uncertainty, had a significant impact on public health with ripple effects on the global economy. From aviation to entertainment, sports, education, banking, and fashion, the world has continued to witness a fundamental shift in social behavior and interaction due to the pandemic. While technology has remained the primary driver of social innovation, which has been termed the new normal, it is understandable the impact of the pandemic on the environment may linger in the long haul. It is worth noting the fashion industry has suffered from the COVID-19 pandemic in an unprecedented manner, with fashion and luxury brands grounded to a halt, fashion shows called off, orders canceled, and factories shut down or refocused to produce or supply PPEs [2].

Amidst the pandemic, predictions indicated that

about 80% of fashion companies in Europe, and North America may go bankrupt, while the United Kingdom's sales of clothing and footwear were projected to decline by 36% as the entire fashion landscape continued to drift [3]. Statistics also indicate about 1,000 factories in production hubs in India, Bangladesh, the Philippines, and Pakistan were shut down due to the cancellation of about £2.26 billion in orders by global fashion brands [4]. Thus, a major humanitarian crisis now loomed as close to 1.9 million designers, and factory workers lost their sources of livelihood in India, Bangladesh, Pakistan, and the Philippines [5].

Interestingly, the situation is no different in Africa, where countries like Nigeria, with the largest share of the fashion market in sub-Saharan Africa, were grounded with several fashion entrepreneurs thrown out of business [6]. Accordingly, the preceding demonstrates the impact of the pandemic is far-reaching as fashion entrepreneurs in both developed and developing economies experienced challenging times due to COVID-19 [7].

This paper draws upon data obtained during the researchers' MSc dissertation in 2020 summer. Therefore, in appraising the impact of the pandemic on the global fashion industry, it is essential to examine how the fashion industry in developed and developing contexts navigates the turbulent times. Nigeria presents an important scenario to reflect on how the pandemic has shaped the course of fashion entrepreneurship in Sub-Saharan Africa. Moreover, since the West African country commands the largest share of the fashion market in Africa, it will sufficiently give the requisite insights into the impact of the pandemic and the post-COVID-19 future of fashion retail in Nigeria and Africa at large.

Our research work underpinned the Triple-Trickle Theory that incorporates the role of media and technology in understanding and organizing the diffusion of sustainable fashion. This will thereby identify paths for future trickle effects on fashion research [8].

2. Impact Of Covid-19 On Fashion Entrepreneurship in Developed and Emerging Economies

The impact of COVID-19 on fashion retail in India

has been linked to the socio-cultural landscape of the Asia-Pacific country. Thereby suggesting the pandemic may not have had a significant impact on the fashion industry if lockdown restrictions were not imposed on large social gatherings like wedding festivities, which is considered one of the biggest industries driving fashion retail in India [9]. In Pakistan, the impact of COVID-19 on the fashion industry is associated with the over-reliance of the sector on textile exports to the United States, United Kingdom (UK), and Germany [3][10]. Hence, when top fashion brands in these export destinations drastically reduced orders, fashion retail was grounded to a halt leading to job losses and the shutdown of garment factories. However, while fashion retail in India also suffered from a drastic reduction in exports, some arguments suggest fashion retail in societies with a large informal sector like India, may have absorbed the impact of COVID-19 if lockdown restrictions did not alter the socio-cultural lifestyle of the people [9][11].

In more advanced societies with dominant formal sectors like China, Italy, France, the USA, and the UK, the impact of COVID-19 on consumer behavior tends to take a different turn. Government restrictions on international travel, coupled with anxieties over high COVID-19 death rates, imply consumers in leading fashion hubs were more focused on their health than shopping for luxury fashion or engaging in social activities. The development thereby led to a complete shutdown of fashion businesses in the advanced economies of Europe and America. Moreover, when air travel was banned in China, Chinese shoppers who have been the leading consumers of global luxury fashion in the past ten years were unable to travel to make purchases in New York, Paris, London, and Milan [12]. In other words, unlike arguments regarding India and Pakistan, government restrictions based on environmental factors such as health and well-being, may have had more impact on fashion retail in advanced economies [3][9][12]. This argument is hinged on claims that the pandemic disrupts exports and imports of fashion apparel and beauty products, as well as all social activities in developed economies which completely took a backseat during the COVID-19 pandemic.

3. The Nigerian Fashion Industry, Restrictions, and the Aso Ebi Economy

The Nigerian fashion industry was estimated to be worth about \$4.7 billion before the advent of the COVID-19 pandemic [10]. According to the National Bureau of Statistics, the fashion industry, notably, the textile, apparel, and footwear sectors contributed an average of 17% to the national GDP between 2010 and 2019, a growth pattern that edged the Nigerian fashion industry to global consciousness [13].

However, in considering the dynamics of the fashion industry in Nigeria, it is essential to note that a few production hubs drive the sector in the country. They include Lagos, Kano, Abuja, and Port-Harcourt fashion markets. Although Lagos, which is the commercial nerve center of the Nigerian economy tends to command a comparative advantage over other fashion hubs, the fashion market in Abuja is substantially large with its peculiar dynamics. Unlike Lagos, the Abuja fashion market is at the heart of the administrative headquarters and the seat of political governance in Nigeria [13]. Hence a specific focus on the Lagos and Abuja fashion markets will sufficiently reflect the impact of the COVID-19 pandemic on fashion enterprises and how stakeholders in the fashion industry in Nigeria think the sector should navigate toward a sustainable future, post-COVID-19. Understanding these dynamics would contribute significantly to the body of literature on the impact of the COVID-19 pandemic on the fashion industry and enhance understanding of how the fashion industry should shape towards a profitable future in a developing country context.

While the impact of lockdown restrictions on fashion enterprises in Nigeria may not be different from the patterns observed in other informal economies like India, it is worth noting the effect of lockdown restrictions on the socio-cultural landscape in Nigeria runs deep, thereby contravening the claims [12] that lockdown restrictions may have had more impact in developed economies because of their fierce implementation in advanced societies [6]. The impact of lockdown restrictions goes beyond mere supposition that Nigerian events such as attending weddings, birthdays and burial celebrations, as well as corporate functions, church services, and religious festivities like Christmas and Salah celebrations, are halted. A brief examination of the Aso Ebi culture may give more insight into the dynamics associated with COVID-19 lockdown restrictions and their impact on the socio-cultural landscape in Nigeria. It is observed that the Aso Ebi culture is a better reflection of how the various ethnic groups uphold fashion in high esteem in Nigeria. Aso Ebi which means 'family cloth' in the Yoruba language typifies a form of uniform dress code worn by family members or friends of celebrants to different social events in Nigeria. Similarly, Aso Ebi does not only serve as a means of identifying with the celebrant but enables well-wishers to attract special recognition while at the same time constructing their meaning of self, social identity and social relations and solidarity. In the same vein, the Aso Ebi culture eliminates class differences as everyone wearing it at an event is regarded as the same irrespective of their status in society [13][14].

Furthermore, the principle of reciprocity is a significant driver of the Aso Ebi culture as it ensures individuals who subscribe to it in a particular social event expect others to return the same gesture when it

is their turn [16]. It is therefore understandable that with a large population of Nigerians involved in the Aso Ebi culture, the government's ban on social events significantly affected the Aso Ebi economy. Fashion designers, fashion stylists, fashion photographers and textile merchants who are major stakeholders in the Aso Ebi economy lost patronage, just as tailors who make Aso Ebi designs suffered loss of jobs. The middlemen and women who plan social events including food vendors, masters of ceremonies, comedians, musicians, and other similar stakeholders in the Aso Ebi economy were completely shut out of business and their means of livelihood were cut off. The multiplier effects go on and on as the entire fashion industry ground to a halt as a result of COVID-19 lockdown restrictions.

4. Sustainability in the Nigerian Fashion Industry

Over the years, the concept of sustainability is gaining recognition in the Nigerian fashion industry. In line with the United Nations Sustainable Development Goals (SDGs), specifically, SDGs 8 & 12; decent work and economic growth, and responsible consumption and production, respectively (see Figure 1), appear to take center stage in the adoption of the sustainability concept in Nigeria. Therefore, practical application of sustainable activities is evident in job creation due to the low barrier of entry into the fashion sector and is seen more in practice through the management of scarce resources, reuse and remodeling of old fashion pieces rather than understanding in detail the meaning and concept of sustainability [17][18].



Figure 1. SDGs Reflected in the Nigerian Fashion Industry [17]

Nevertheless, some challenges associated with the implementation of sustainability in the Nigerian fashion industry are largely associated with the limited knowledge of the application of the concept to already existing business models. Secondly, although

there are rising fashion businesses adopting sustainable business models, the cost of sourcing and producing sustainable fashion products or services poses a major challenge to such businesses. Furthermore, epileptic power supply, poor transportation systems, lack of good roads, insecurity, and low ranking in terms of ease of doing business are other important gaps that could impact the post-pandemic future of fashion retail in Nigeria. Reliance on petrol and diesel generators as alternative sources of electricity due to the poor power supply needed for machinery in garment production [19].

Also, the influx of second-hand garments from developed countries, end up in landfill, thereby generating waste and pollution [20]. These challenges can be mitigated through an increase in workshops and training on the concept of sustainability and practical application to new and already existing business models. The target audience for such workshops should include local fashion business owners in rural areas who may not have access to the Internet or have limited educational exposure. Furthermore, the concept of sustainable business models should be tailored to fit specific university courses and included in the modules taught in higher education institutes in Nigeria. Secondly, businesses should be encouraged to adopt renewable energy as an alternative power supply to reduce carbon emissions from generators leading to air pollution [17][19].

5. Methodology

The qualitative method, which is adopted for this paper, enabled the researcher to gain an understanding of the impact of COVID-19 on the fashion industry through the lens of stakeholders who had first-hand experience in Nigeria and grant the researcher access to participants with sufficient knowledge about the policy implication(s) of the pandemic and the policy options that can be explored towards a sustainable future of fashion entrepreneurship in Nigeria. The study adopts an interpretivism philosophy, an inductive approach, and qualitative data was collected through semi-structured interviews with fashion entrepreneurs in Abuja and Lagos. The participants are fashion entrepreneurs with specializations in fashion design, textile merchandising, fashion education and training, fashion styling, and a policy elite. These categories of stakeholders are knowledgeable about the impact of the COVID-19 pandemic across the broad spectrum of the fashion industry in Nigeria and may have innovative recommendations to fashion enterprises on how best to navigate post-pandemic. The criteria for selection include the physical and social media presence of the fashion brand, Influence over smaller fashion enterprises, estimated turnover, and perceived understanding and knowledge of contemporary issues in the fashion industry. In addition, considering that

the study also borders on policy, the need for a policy elite familiar with monetary policy-implementing institutions like the Central Bank of Nigeria (CBN) was selected to participate in the research. The participant also responded to questions on possible bureaucratic, administrative, and political concerns that could impact the ability of fashion enterprises in urban and rural areas to access critical funding opportunities while navigating through the broad spectrum of current challenges that could militate against a sustainable future. The data collected were analyzed using thematic analysis with the rationale for the choice of data analysis technique being that thematic analysis provides the researcher the opportunity to closely examine the data to identify common themes, ideas, and patterns of meaning that come up repeatedly [21]. The interview questions were framed within the context of the Six (6) elements of the PESTLE analysis framework, data collected were transcribed and coded manually such that themes were derived to explain each of the PESTLE elements.

6. PESTLE Analysis and Discussion on Covid-19 Impact on the Nigerian Fashion Industry

The data collected were arranged to show that responses bordering on Political factors were brought together and coded. The same approach applies to data on Economic, Socio-cultural and Technological. The participants have been addressed using codes, these as PE for the Policy Elite, and FE, which stands for Fashion Entrepreneur with a specific speciality such as the textile merchant (FE 1), fashion designer/brand influencer (FE 2), fashion stylist (FE 3), fashion designer (FE 4), fashion design tutor (FE 5) and fashion designer (FE 6).

6.1. Theme 1 Political

The responsibility to manage and contain the COVID-19 pandemic rested on the political leadership, especially at the federal and state government levels in Nigeria, as a result, several political decisions were taken to mitigate the spread of the COVID-19 pandemic around the country, and these decisions bore implications for fashion retail. Although FE 3 and FE 4 applauded the government for taking the issue of public health seriously by enforcing lockdown protocols in commercial cities like Lagos, and Abuja, FE 5 was of the view that the government was not painstaking enough in its interventions, most of which lacked cognizance of peculiar sectors like the fashion industry. FE5 argued that the blanket lockdown measures were pronounced with many businesses at a loss on what to do, as the approach may have accounted for the partial

compliance to lockdown and social distancing rules across the country in some regard. Furthermore, while FE1 recognized the need to contain the spread of COVID-19, the respondent expressed dissatisfaction with the outright ban on social events including parties and religious gatherings, which are major drivers of the fashion industry in Nigeria. FE 1 also identified the closure of international borders on land, air and sea as another political decision that contributed to the crash of the fashion industry as exports of fashion products declined rapidly and importation of textile inputs became impossible for textile merchants. FE 1 stressed that both actions by the government led to galloping inflation, massive lay-off of workers and closure of fashion businesses by entrepreneurs who could not cope. The position of FE 1 is not unconnected to the argument that the restrictions imposed on large gatherings in India including weddings and religious activities adversely impacted the fashion industry. Although similar restrictions were imposed in the United Kingdom, there is no substantial evidence in the literature that restricting football fans from the stands during Premier League games impacted the fashion industry in the UK. This could be because unlike developing economies where large social gatherings and religious events drive the fashion industry, that cannot necessarily be said of the fashion markets in the developed economies of Europe and America [9][12]. While PE acknowledged the political decision to enforce lockdown protocols adversely impacted the fashion industry including a decline in consumption and production of fashion products, he claimed the effect of lockdown is not an all-round negative. PE particularly observed a change in consumer preferences, from elegant to basic fashion wear, a position that tends to confirm the theory of the Consumer Decision Making Process as reflected in the Consumer Buying Behaviour diagram in Figure 4. FE 2 who designs and produces high-profile clothing agrees with PE claiming the fashion pieces of her brand that sold the most during lockdown were regular home wear and casual wear. FE 2 claimed her business quickly migrated to making simple fashion pieces which raked in much revenue such that the brand continues to break even in spite of the lockdown. In the same vein, both FE 4 and FE 6 claim to have migrated to making PPEs for frontline health workers. Hence, such an innovative approach to fashion retail during the COVID-19 pandemic can be explained by Joseph Schumpeter's innovation theory which upholds that innovation remains the bedrock of every entrepreneurial endeavor. The theory specifically suggests innovation can either help in the launch of a new product or an upgrade of an already existing product or the application of a new method of production or a more innovative approach to the marketing of a product not yet proven in the industry [22]. Thereby reiterating the fact that even though the

political decision taken to manage the COVID-19 pandemic may have adversely impacted fashion retail in Nigeria, the emerging new normal presents fresh opportunities which only fashion entrepreneurs that endeavor to be innovative can identify and maximize.

6.2. Economical

According to PE, the Nigerian economy is largely driven by the informal sector which is about 60% which has resulted in several interventions and subsidies emplaced by the federal government for Small Scale Enterprises (SMEs). PE stated such funds have been reinvigorated since the advent of COVID-19, to mitigate the impact of the pandemic on SMEs and households. According to PE “most interventions by fiscal and monetary institutions have been targeted at making seed and working capital available for SMEs and households”. PE further claimed the interventions include the first and second tranche of CBN COVID-19 Palliative totalling about £210 million (N100 billion). In the same vein, FE 2 indicated that although she was unable to access the CBN palliative fund, she knew two fashion designers who accessed two million (2) naira each (about £4,000 considering the exchange rate in 2020). FE 2, however, opined the criteria for selecting beneficiaries remained unclear. Similarly, FE 4 stated she was aware of some fashion designers that benefited from the CBN palliative even though she never bothered to apply for it. Both FE 1 and FE 6 claimed they heard about the loan but never expressed interest, FE 6 stated the rationale behind her lack of interest in the government palliative was that she was servicing a loan obtained from a commercial bank prior to the COVID-19 pandemic. FE 5 claimed she never heard about the CBN COVID-19 palliative and her efforts to secure a credit facility from a commercial bank during the lockdown failed to yield any positive outcome. To provide insight into the discussion, PE gave reasons why most SMEs in Nigeria including fashion retail were unable to secure credit facilities from commercial banks and other monetary institutions. The reason provided by PE is simply because the 38 banks consider them ‘high risk, and since most SMEs do not have proper documentation the financial institutions do not really want to have anything to do with them’. PE also shed light on the criteria for selecting beneficiaries for the CBN palliative as indicated in the official circular of Central Bank of Nigeria (CBN) stating the guidelines for implementing the COVID-19 palliative [23] and why many SMEs could not benefit from it. In his words: “One thing was common with those who could not access the CBN palliative – the issue of record keeping. Many could not meet the basic criteria of providing a bank statement, income statement, and BVN. Those minimum criteria are necessary for an assessment officer to make favorable decisions, as

they reflect the kind of businesses an SME has been engaged in, the capacity of the business, and the kind of income coming into the business. If you have been handling N10,000 and now you are asking for N10 million there is no rational assessment officer that will give a nod to such approval. Also, the facilities are for those heavily impacted by the coronavirus pandemic. Some SMEs could leverage on their own resources or family support to manage through the pandemic while others can literally not operate at all. Those who absolutely have no support from elsewhere are the primary target of the CBN palliative”. Meanwhile, apart from issues associated with accessing credit, the high exchange rate was identified by FE 1, FE 2, FE 3, FE 4 and FE 5 as a major impediment to fashion retail even during the COVID-19 pandemic. FE 1 observed that in addition to the high exchange rate is the astronomical rise in import duties which in most cases rose to about twice the original amount paid for imported goods. While FE 2 added the high exchange rate and import duties led to a scarcity of fashion prints, FE 5 was of the view that the two factors, exchange rate and import duties, led to galloping inflation which ate into the profit margins of fashion entrepreneurs. However, according to PE, while the high exchange rate will continue to adversely impact fashion businesses trading imported clothing including ready-to-wear, the high exchange rate remains a major boost for fashion retail earning foreign exchange from exporting African fabrics made in Nigeria, which is in high demand around the world. FE 2 confirms PE’s argument stating she could not meet the demand for some fashion pieces by her foreign clients most of whom are residents in the United Kingdom, United States, Côte D Ivoire, South Africa and other parts of the world. Furthermore, PE attributed the possible rise of import duties to the commitment of the federal government to shield the local economy from foreign competition by taxing imports of fashion inputs and other products that are considered detrimental to the growth of the economy.

6.3. Socio-Cultural

As highlighted in section 3, the dynamics of the Aso Ebi culture depend largely on social events to propel the fashion economy in Nigeria. Particularly, the literature highlights how the decision of the federal government to ban social events and large gatherings undermined the fashion industry. PE, FE 1, FE 2, FE 3, FE 4, and FE 5 agreed that the socio-cultural lifestyles of Nigerians are the bedrock of fashion retail and remain the most important factor in upholding the entire fashion industry in Nigeria. FE 1 noted that in Lagos which is Nigeria’s commercial nerve center, social events define the cultural landscape of the city as the people organize parties to celebrate life’s achievements ranging from the

mundane such as purchasing a new car to more significant accomplishments like gaining a new political appointment. FE 1 further identifies other life events commonly celebrated to include a child graduating from college or gaining admission to a foreign university, christening and naming ceremonies and parties for new-borns, burial parties to celebrate the life and time of a deceased, housewarming to celebrate a new home, and traditional and church weddings as well as wedding anniversaries, amongst others. PE further noted that with the large number of Nigerians around the world, the culture of Aso Ebi and celebration have become a major export commodity, as there has been a growing demand for African fabrics that are designed in Nigeria. Corroborating PE's arguments, FE 2, FE 3, and FE 4 noted that the export of Nigerian-made fabrics has been their major source of revenue and foreign exchange earner. Thereby confirming the Cultural Commodification Theory which contends that a cultural lifestyle can be packaged to generate monetary value by turning cultural products into commodities that can be bought and sold beyond the geographical landscape where such culture emanates [14]. It is therefore understandable why the ban on social activities significantly impacted fashion retail in Nigeria. For instance, FE 1 and FE 6 observe the ban on social events grounded in fashion retail businesses in Lagos and Abuja. FE 3 stated that the ban on international travel affected her annual summer sales of Nigerian fashion wear in the United States. But while FE 2 agreed that the lockdown had monumental consequences for fashion retail, she stated that she explored delivery agencies such as DHL to meet clients' demands across Nigeria and around the world. Hence, reiterating an earlier conclusion that an innovative approach is vital for fashion retail to stay afloat even in the emerging new normal for the fashion industry in Nigeria.

6.4. Technological

Prior to the COVID-19 pandemic, scholars and experts in the fashion industry emphasized how technology will define the future of fashion retail, this is evident in businesses seeking necessary digital solutions as a result of the pandemic. By adopting improved technology, fashion brands are likely to embrace improved technology such as adopting Virtual Reality, Augmented Reality and Artificial intelligence. Furthermore, by effectively using chatbots and emails to solve customers' queries, tech apps will enhance better customer relationships. Also, machine learning for forecasting demand augmented shopping that allows customers to try products in virtual spaces, and contactless shopping that supports the use of barcodes and QR codes, are technological solutions that could redefine the future of fashion retail [24].

Table 1. Internet Speed Country by Population 2020 [24] [25]

COUNTRY	BROADBAND SPEED	MOBILE SPEED	POPULATION 2020
IVORY COAST	14.78	20.28	26,378,274
ANTIGUA & BARBUDA	14.73	27.21	97,929
ETHIOPIA	14.13	15.84	114,963,588
ZAMBIA	13.86	14.01	18,383,955
PALESTINE	13.82	6.32	5,101,414
WESTERN SAHARA	13.69		597,339
NAMIBIA	13.35	13.43	2,540,905
IRAN	13.12	27.66	83,992,949
TANZANIA	12.95	11.72	59,734,218
ANGOLA	12.93	20.8	32,866,272
RWANDA	12.62	9.08	12,952,218
BOLIVIA	12.23	17.14	11,673,021
ZIMBABWE	12.18	14.74	14,862,924
HONDURAS	11.82	22.58	9,904,607
EL SALVADOR	11.2	10.46	6,486,205
NIGERIA	11.17	15.79	206,139,589
SOMALIA	11.14	9.09	15,893,222

According to PE, SMEs that adjust to the pandemic by exploring the opportunity technology affords are able to do so through social media and online marketing strategies to drive sales from the comfort of their homes. PE stressed that businesses most impacted by the pandemic are those that failed to capitalize on technology. Corroborating PE's position FE3 affirmed her business never had a website until COVID-19 when it became inevitable to do so. Similarly, FE6 said the pandemic made her upgrade her social media accounts while undertaking digital solutions training. While FE4 observe that more fashion entrepreneurs have embraced online payment platforms like PayPal and Paystack, FE4 stated apart from Facebook and Instagram, Tiktok, Triller and Zynn are some of the apps most explored by fashion businesses during the pandemic in Nigeria. However, PE noted technology came with unanticipated costs, especially in Nigeria which only recently ranked among the countries with the least affordable internet in the world despite the limited broadband speed (see Table 1), and the unbearable cost of internet remains a major impediment to the use of technology by fashion retail in Nigeria [25]. FE1 identifies another barrier as a lack of digital skills amongst most fashion entrepreneurs in Nigeria. FE2 stated cybercrime and internet fraud are other hurdles to how technology including online and digital payment platforms are embraced and integrated in the fashion industry in Nigeria. FE2 further added that most fashion brands in Nigeria are not exposed to contemporary technological tools like Artificial Intelligence (AI) and Machine Learning. Confirming this position, FE 3, FE 4, FE 5, and FE 6 all attested not to know how AI and Machine Learning apply in contemporary fashion retail. However, FE 2

confirmed few brands are now exploring modern sketch tools in sketching and design, while also noting that Nigeria brands that have continued to maximize new technologies have gained unprecedented exposure to local and international opportunities. Accordingly, the foregoing positions of respondents suggest that the COVID-19 pandemic has not only adversely impacted fashion retail in Nigeria but has brought about new opportunities. This can be situated in Peter Drucker's Opportunity-Based Theory which states that entrepreneurs should be flexible enough to identify new opportunities in the changes brought about by natural events, technology, or consumer preferences. The theory emphasizes that only entrepreneurs who respond well to such changes will maximize the opportunities that come with changes in a particular sector [26]. Consequently, even though the fashion industry in Nigeria commands a large share of the fashion market in Africa before COVID-19, for it to maintain its leadership position in the new era, it should follow with the application of emerging digital solutions within the environment of global fashion retail.

6.5. Legal

According to the Global Corruption Index (GCI) 2019, Nigeria ranks 146 out of 180 countries [27]. FE1 is of the view corruption in Nigeria has not only eaten deep into the fabric of society but is impacting fashion retail in several ways, from bribes demanded from importers of textiles materials and other fashion inputs at the ports, to double and excessive billings for electricity consumption, as well as double taxation and all forms of grafts which tend to add to the cost of production and overhead. FE5 identify the absence of copyrights and patent laws as a major impediment to creativity, as pirating and plagiarism, as well as outright theft of intellectual content without consequence as a common occurrence in Nigeria. FE6 associated other problems with those bordering on registration of business names and incorporation of fashion brands, as well as a lack of contract culture that hardly binds on the different parties, such that tailors can flaunt agreements with fashion houses that employ them with little or no consequence on their part, a development that tends to render most fashion brands stranded or stunts in growth. Accordingly, FE1 calls on the government to reinforce appropriate anti-graft legislation to mitigate the impact of corruption on fashion retail. FE5 specifically called for the entrenchment of copyrights and patent laws that protect intellectual contents including training materials, patterns and concept designs. FE2 stated the need for appropriate legislation that will create a structural framework for the fashion industry, noting that despite its huge potential in boosting the economy and promoting Nigeria's culture and diversities around the world the fashion industry is still

considered and treated as a "mere" small-scale business.

On government supervision and support, while FE2 argues that the fashion industry can come under the supervision of the Ministry of Culture and Tourism, FE1 reiterated the need for appropriate legislation to strengthen the Fashion Designers Association of Nigeria (FADAN). FE3, FE4, and FE5 implored the federal government to urgently revisit the legislation authorising the closure of international borders, especially land borders, which has only exacerbated the smuggling of fashion inputs such as textile materials sold exorbitantly. The foregoing arguments bring to mind a study on the rule of law and entrepreneurship [28]. They both argue that even though Thomas Paine postulated about 250 years ago that the rule of law ought to be king in every free enterprise society, the protection of property rights and the rule of law are still most crucial for the growth and prosperity of entrepreneurship even in the 21st century. The Quality of the Rule of law explores World Bank Governance Indicators to study the rule of law and entrepreneurship in Europe. One of such indicator upholds that the rule of law encompasses the degree to which an entrepreneur has confidence in and abides by the rules governing society and entrepreneurship [28]. Such rules are those bordering on contract enforcement, property rights, the police, courts, crime and violence. While the conversation on the rule of law in Nigeria has focused on the criminal justice system, little has been said about how the rule of law should apply to entrepreneurship, including fashion retail [29].

Accordingly, talking about how fashion retail can proceed towards a sustainable future, there is an urgent need for the federal government in collaboration with other critical stakeholders to emplace necessary legal frameworks and measures that will bolster the confidence of the various players in the fashion industry in the rule of law in Nigeria [30].

6.6. Environmental

Our research here is a gap in the literature on the topic of the specific national strategy for environmental sustainability in Nigeria, therefore how the concept of sustainability applies to the different sectors of the economy including fashion retail, needs to be examined [31]. Both PE and FE2 earlier provided possible insights into why this may be the case. Their arguments point to a lack of coherence in the institutional frameworks bordering on the protection of the environment. Accordingly, FE1 called for the emplacement of a robust structural framework to mobilise for environmental protection and conservation. FE2 stated government should make it a matter of national urgency to address the leadership problems militating against sustainable

fashion in the country, by deliberately applying the concept of environmental conservation to the fashion industry. While PE reiterated the need for the government to pursue policies that will make alternative sources of energy available to all Nigerians, he also calls for intense education on environmental sustainability through the development of robust school curricula on environmental preservation for primary and secondary schools, as well as tertiary institutions across the country.

Basically, at the heart of the foregoing positions by respondents is that the knowledge, understanding and application of the concept of environmental sustainability is still low in Nigeria, such that even though the concept may be well documented at the policy level, it is still way off from being implemented in the various sectors of the economy [31]. Two issues can be attributed to why this may be the case. First, the general perception that fashion is for housewives and women trying their hands on a few new things. In a society where gender discrimination is still a major concern, it is understandable why such a negative perception of fashion may not induce the required commitment and passion from a male-dominated policy environment [32]. Secondly, a lack of a robust educational system where fashion and associated concepts are thoroughly studied has been identified as a major concern [33]. For instance, unlike other leading fashion hubs around the world, there is still much ground to be covered regarding fashion education and the concept of sustainability, such that while countries like South Africa can boast of numerous universities, colleges and other training institutions offering globally competitive fashion design and related programmes, there are very few known educational institutions such as university, polytechnic or college of education in Nigeria offering a degree, diploma or certificate in fashion design, the closest to that will be one or more courses in Home Economics that could relate to fashion [33]. Mostly, fashion education in Nigeria is obtained at training centres set up by some person(s) who learnt about fashion from other fashion businesses, online or few others with foreign education or exposure [34]. Accordingly, the understanding of concepts such as sustainable fashion and important theories are not necessarily a part of the knowledge base of even major players in the fashion industry in Nigeria [34]. It is therefore vital for the government and other critical stakeholders to consider galvanising resources aimed at institutionalising fashion education across the different strata of the educational system in Nigeria. Even though the Nigerian fashion industry has made a mark in the world of global fashion retail, much more can be achieved if there is a concerted national strategy driven by the right mix of policies that explores the abundant opportunities in the sector. This will not only enable fashion retail in Nigeria to progress towards a sustainable future but will

reposition the fashion industry in Nigeria to compete more favorably at the international stage

7. Fashion Enterprises and A Post-Pandemic Future

In the face of uncertainties such as the COVID-19 pandemic and the consequent economic crisis, implies that embracing new approaches in fashion retail has become all the more necessary. Just as the Great Depression and World War II transformed people's wardrobes [35], the pandemic is modifying future fashion trends with the possibility of transiting from fast to slower fashion. Fashion brands are likely to increasingly adopt technology in delivering value to customers such as investing more in showroom technology that gives buyers the option of virtual shopping. Scholars and experts who hold these views have continued to emphasize how technology will define the post-pandemic future of fashion retail [36]. Adopting improved technology, fashion retail, moving forward, will readily support the sustainability of the environment. The use of emails, applications, and chatbots will be used more regularly to solve customers' queries, thereby, enhancing better customer relationships. Other forms of technological innovations include algorithm-based Software such as Artificial Intelligence (AI) could impact the post-pandemic future of fashion retail the most. Also, encouraging a cashless society through the use of POS and brand apps and websites for ease of payment both online and in-store. Also, machine learning for forecasting demand augmented shopping that allows customers to try products in virtual spaces, and contactless shopping that supports the use of barcodes and QR codes, are technological solutions that could redefine the future of fashion retail [37].

Scholars and experts advocating that technology will be the sole driver of fashion retail post-COVID-19 will have to take cognizance of the disparities in technological advancement in developed and developing country contexts. For instance, while Nigeria ranks sixth in the top twenty internet users in the world with 63% of the population connected to the internet, it ranks about 142 in terms of internet speed. Hence poor internet connectivity in Nigeria and other underdeveloped economies may not be able to support the emerging digital solutions that are being advocated by leading experts in the global fashion industry. Moreover, only recently Nigeria was ranked as having the most expensive internet in the world. Therefore, migrating wholesale to online and digital platforms remains an unrealistic expectation in the foreseeable future in Nigeria [37][13].

In Nigeria, post-COVID-19 pandemic, fashion executives focus on business survival, and digital solutions have made more inroads in fashion retail across the country (McKinsey.com, 2020). Furthermore, while experts are optimistic that moving

forward, the COVID-19 pandemic will positively impact the culture of sustainable fashion around the world, with the debate now centered around how well the concept of sustainable fashion has been embraced and integrated in Nigeria (Cernansky, 2020; Agbonkhese & Aganbi, 2016). For instance, despite the many challenges, such as overdependence on imports of raw materials, lack of government funding to support fashion sustainability, lack of coherent national strategy to safeguard and protect the environment, and inadequate public awareness about the concept of sustainable fashion many brands have continued to draw attention to sustainable fashion [38][31].

8. Recommendation and Conclusion

One of the study's main contributions pertains to the argument that the impact of the pandemic cannot be said to be equal and proportionate in the various socio-economic contexts around the world [2]. The study has been able to reflect the impact of COVID-19 on fashion retail from a developing economy context such as Nigeria. It has also raised the need for other studies to employ a similar methodology in appraising the impact of the pandemic on fashion retail in developed and developing economies context around the world. Such collective efforts will give a better view of the impact of the pandemic on global fashion retail pending when more holistic research or studies can be carried out in the future.

While the ensuing debates indicate that the post-pandemic future of fashion retail will largely depend on technology, the assumption that the human race will drastically plunge into the world of digital solutions as a means of survival may not necessarily be the case in all contexts. For instance, though the place of technology remains sacrosanct moving forward, consumers will continue to switch between in-store and online experiences in the foreseeable future, hence the argument for a digitally dominated space does not necessarily suffice.

This research was carried out during the peak of the Covid-19 pandemic, therefore this provides room for detailed research that may be conducted on Post Covid-19 pandemic impact on the fashion businesses, where more robust insights into how the COVID-19 pandemic impacted the world of global fashion retail, and more specifically, Nigeria. Secondly, the PESTLE analysis has been applied to this research area, however, further research can be carried out by adopting a different academic framework relevant to the research.

Embarking on further research at this time will not only give more insight into the impact of the pandemic on global fashion retail but could provide critical understanding for those in the policy environment. Particularly, the implementation of more sustainable practices and business models could provide a

significant opportunity for fashion retail. Finally, the study has opened an important debate on how stakeholders including experts and scholars in global fashion retail should approach engagements bordering on repositioning the fashion industry towards a sustainable future. Specifically, the study has been able to bring to the fore that different conditions exist that would impact how fashion retail shapes a sustainable future. The conditions border on disparities in technology between developed and underdeveloped countries, variations in infrastructure and other social amenities, as well as the rule of law. Others relate to the quality of fashion education and good governance available in developed and underdeveloped economies around the world. These various conditionalities could define whether fashion retail in some socio-economic contexts, could crash and remain moribund in the long term or others would regain momentum as soon as possible and move up on a trajectory of growth into the foreseeable future.

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