

**DIGITAL NATIVES: A STUDY EXPLORING DIGITAL FASHION MARKETING  
COMMUNICATION STRATEGIES FOR SOUTH AFRICAN  
GENERATION Z CONSUMERS**

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**DIGITAL NATIVES: A STUDY EXPLORING DIGITAL FASHION MARKETING  
COMMUNICATION STRATEGIES FOR SOUTH AFRICAN GENERATION Z  
CONSUMERS**

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I declare that the above titled thesis is my own work and that all the sources that I have used or quoted have been indicated and acknowledged by means of complete references.

I further declare that I submitted the thesis to originality checking software and that it falls within the accepted requirements for originality.

I further declare that I have not previously submitted this work, or part of it, for examination at Unisa for another qualification or at any other higher education institution.



SIGNATURE

25 February 2025

DATE

## **DEDICATION**

I would like to dedicate this Thesis, which is a true testament to the support, unconditional love and effort, not always easy, sometimes painful, that my mother, Professor Nombeko Mpako, has continued to pour into me. Thank you, Mama, for always encouraging and nurturing the potential you see in me and always being there to catch me when I fall.

This thesis will always remind me that I can do hard things, a reminder of perseverance and my capacity to overcome challenges and achieve my goals.

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## ABSTRACT

The study investigated and recommends possible digital fashion communication strategies that the fashion and marketing industry can apply when targeting products and services to the preferences, values, beliefs and influential economic participation of South African Gen Z consumers. An innovative conceptual framework was developed that was applied to the marketing strategies of nine South African-based fashion companies, evaluating the effectiveness of the digital fashion marketing and communication methods used to target Gen Z fashion consumers. Gen Z are young adults, born in the late 1990s and are popularly known as digital natives as they are digitally astute and place value on online communities and interactions. Gen Z consumers' contribution to the fashion consumer market has increased in recent years. It is therefore pertinent for industries such as fashion to understand how to communicate and interact with them to maximise their economic agenda. The study's population included a selection of South African fashion companies that offer omnichannel integrated retail models and target Gen Z consumers. The study was framed by the Digital Marketing Effectiveness Framework (DMEF), which emerged from a combination of an empathic design approach and digital affect, and digital marketing strategy frameworks. Since Gen Z is characterised mainly by being digital natives, the study's methodology was set within digital fashion communication channels such as social media. Mixed research approaches, i.e. both qualitative and quantitative, were utilised through surveys and netnographic data collection, analysis and interpretation methods. It was envisaged that this study would invigorate Gen Z consumers' satisfaction in their pursuit of fashion consumption. By continuously adapting to the needs and preferences of Gen Z consumers, fashion brands can foster stronger connections and enhanced brand loyalty, drive sustainable growth in the digital era and ensure future preparedness for the potential buying and spending power that Gen Z has concerning the marketing and sales of fashion products and services.

### **Keywords:**

Consumer behaviour; empathic design; digital affect; digital fashion communication; digital marketing effectiveness; digital marketing strategy; fashion marketing; Generation Z; netnography; social media; user-generated content

## ISISHWANKATHELO

Olu phando luphanda kwaye lucebisa ngezicwangciso zonxibelelwano lwentengiso yefashoni zedijithali ezinokusetyenziswa licandelo lefashoni nentengiso ezijoliswe ekuthengiseni iimveliso neenkonziso ezingqinelana neenqobo ezisemgangathweni, iinkolelo, oko kuthandwa noko kuphemelela intatho-nxaxheba kuqoqosho yabathengi besizukulwana Z baseMzantsi Afrika. Kuqulunqwe inkqubo-sikhokelo enobuchule yengqiqo esetyenziswe kwizicwangciso zentengiso zeenkampani zefashoni ezilithoba eziseMzantsi Afrika, kwaphononongwa ukufezeka kweendlela zedijithali zonxibelelwano nentengiso yefashoni ezisetyenziswa ukutsala umdla wabathengi besizukulwana Z. Isizukulwana Z ngabantu abadala abaselula abazelwe kwiminyaka yangoo-1990 nabaziwa ngokuba sisizukulwana sedijithali kuba banobuchule kwizinto zedijithali kwaye bayakwazi ukunxibelelana ngeintanethi ngeendlela ezahlukeneyo. Kule minyaka lonyukile igalelo lesizukulwana Z kwintengiso yefashoni. Kubalulekile ke ngoko ukuba icandelo lefashoni liyiqonde indlela efanelekileyo yokunxibelelana nesi sizukulwana ukuze likhule. Olu phando lwenziwe kwiinkampani zefashoni ezikhethiweyo eziseMzantsi Afrika ezithengisa lonke uhlobo lwempahla nezijolise ekutsaleni umdla wabathengi besizukulwana Z. Olu phando lusekelwe yiNkqubo-sikhokelo yokuFezeka kweNtengiso yeDijithali (DMEF), evela kwindibaniselwano yoyilo lovelwano nempembelelo yedijithali, kunye nezicwangciso zentengiso zedijithali. Uphawu lwesizukulwana Z kukuba ngabantu abazelwe ngexesha ledijithali ngoko ke olu phando lusebenzisa amajelo onxibelelwano ngefashoni afana namajelo onxibelelwano kawonkewonke. Kudityanise uphandontyilalwazi kunye nophando lweenkcukachamanani xa kusenziwa uphando kwaza kwasetyenziswa i-intanethi ukuqokelela idatha, ukuyihlalutya nokuyicacisa. Bekulindelwe ukuba olu phando luza kukuqinisa ukwaneliseka kweemfuno zabathengi besizukulwana Z xa bethenga ifashoni. Xa iinkampani zefashoni zithi gqolo ukulungiselela iimfuno noko kukhethwa ngabathengi besizukulwana Z ziya kuqinisa uqhagamshelwano nokunyaniseka kwabathengi kwimpahla yazo, ziqinise uhlumo oluzinzileyo kwixesha ledijithali kwaye ziqinisekise ukuba zililungele ixesha elizayo lokuthenga kwesizukulwana Z kunye namandla okuthenga esi sizukulwana esinawo kwiinkonziso nakwiimveliso zefashoni.

### **Amagama angundoqo:**

Indlela yokuziphatha kwabathengi; uyilo lovelwano; impembelelo yedijithali; unxibelelwano lwefashoni ngedijithali; ukufezeka kwentengiso eyidijithali; isicwangciso

sentengiso sedijithali; intengiso yefashoni; Isizukulwana Z; uphando olwenziwa kwi-intanethi; amajelo onxibelelwano kawonkewonke; umxholo oveliswe ngumsebenzisi

## ISIFINQO

Ucwaningo luhlolisise futhi luncoma amasu okuxhumana ngemfashini yedijithali angasebenza ukumaketha embonini yemfashini lapho kugxilwe emikhiqizweni namasevisi kulokho okuthandwayo, izindinganiso, izinkolelo kanye nokubamba iqhaza okunomthelela kwezomnotho kwabathengi beGenZ baseNingizimu Afrika. Kwasungulwa uhlaka lomqondo olusha olwasetshenziswa emasu okumaketha ezinkampanini zemfashini eziyisishiyagalolunye eziseNingizimu Afrika, kuhlolwa ukusebenza kahle kokumaketha kwemfashini yedijithali kanye nezindlela zokuxhumana ezisetshenziswa ukubhekisa abathengi bemfashini beGenZ. I-GenZ ngabantu abadala abasebasha, abazalwa ngasekupheleni kweminyaka ye-1990 futhi baziwa kakhulu ngokuthi abantu bomdabu bedijithali njengoba behlakaniphile ngokwedijithali futhi bebeka inani emphakathini nasekusebenzisaneni okuku-inthanethi. Umnikelo wabathengi be-GenZ emakethe yabathengi bemfashini ukhuphukile eminyakeni yamuva nje. Ngakho-ke kufanelekile ngezimboni ezifana nemfashini ukuqonda ukuthi zingaxhumana kanjani futhi zisebenzisane kanjani nazo ukuze zandise uhlelo lwazo lwezomnotho. Inani labantu abacwaningwayo lalihlanganisa izinkampani zemfashini zaseNingizimu Afrika ezinikeza amamodeli okuthengisa ahlanganisiwe e-omnichannel futhi zihlose abathengi be-GenZ. Ucwaningo lwakhiwe yi-Digital Marketing Effectiveness Framework (DMEF), eyavela ekuhlanganisweni kwendlela yokuklama enozwelo kanye nomthelela wedijithali, kanye nezinhlelo zesu lokumaketha kwedijithali. Njengoba i-GenZ iphawuleka kakhulu ngokuba ngabantu bomdabu bedijithali, indlela yocwaningo yabekwa ngaphakathi kweziteshi zokuxhumana zemfashini yedijithali njengezinkundla zokuxhumana. Izindlela zocwaningo ezixubile, okungukuthi, zombili ezisezingeni eliphezulu kanye nezinhlelo, zasetshenziswa ngezinhlelo kanye nezindlela zokuqoqwa kwedatha ye-netnografikhi, ukuhlaziya kanye nokuhumusha. Kwakucatshangwa ukuthi lolu cwaningo luzovuselela ukwaneliseka kwabathengi be-GenZ ekuphishekeleni kwabo ukusetshenziswa kwemfashini. Ngokuzivumelanisa njalo nezidingo nezintandokazi zabathengi be-GenZ, imikhiqizo yemfashini ingakhuthaza ukuxhumana okuqinile nokwethenjwa komkhiqizo, iqhube ukukhula okusimeme enkathini yedijithali futhi iqinisekise ukulungela kwesikhathi esizayo kwamandla okuthenga nokusebenzisa imali okungenzeka i-GenZ enawo maqondana nokumaketha nokuthengisa imikhiqizo nezinsizakalo zemfashini.

**Amagama abalulekile:**

Ukuziphatha kwabathengi; ukwakheka kozwelo; ukuthinteka kwedijithali; ukuxhumana kwemfashini yedijithali; ukusebenza kahle kokumaketha kwedijithali; isu lokumaketha kwedijithali; ukumakethwa kwemfashini; Isizukulwane Z; i-netnografikhi; imithombo yezokuxhumana; okuqukethwe okukhiqizwe ngabasebenzisi

## LIST OF ACRONYMS

DMEF	Digital marketing effectiveness framework
Gen Z	Generation Z
HCD	Human-centred design
UGC	User-generated content

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## CHAPTER ONE: INTRODUCTION TO THE STUDY

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The marketing and retail industries of South Africa exist within a unique set of conditions that influence consumer behaviour, such as fashion product purchasing decisions. Technological advancements and digital media awareness among emerging and younger generations enhance and alter these influences through their engagement and interaction with digital technology. This study explores relevant digital fashion marketing strategies targeted at Generation Z (Gen Z) consumers to identify effective measures to enhance companies' marketing strategy and digital fashion communication methods. The introduction to the study sets the foundation for an in-depth outline of the study's premise in exploring digital fashion communication methods targeted at South African Gen Z consumers to investigate and recommend possible digital communication strategies that the fashion industry can apply when targeting products and services to the South African Gen Z cohort.

This study highlights the importance of understanding consumer preferences to effectively communicate fashion product information, particularly in the digital space. The digital space concerning this study encompasses social media networks, e-commerce platforms, online forums, and consumer review platforms. In addition, the fashion industry is characterised by change and adaptation to socio-economic factors. Subsequent to this, how fashion is marketed and communicated to its target consumer must be contextually relevant. This study aims to investigate and develop effective digital communication strategies that South African fashion and marketing industries can apply to target Gen Z consumers, who are digital natives with growing influence in the fashion market.

The Gen Z cohort refers to emerging consumers aged between 18 and 28 (Priporas, Stylos & Fotiadis 2017). This description suggests that societies have entered a new era and are experiencing a generational shift or difference relative to the generations which came before Gen Z. These preceding generations include Generation Y, born between the 1980s and the early 1990s (Turner 2015), and Generation X, born between 1960 to the early 1980s (Dias 2003), the Baby Boomer generation born between 1946 and the early 1960s (Turner 2015). These generational classifications are known as social generations (Strauss 1991). Generational cohorts consist of individuals "born at a given time" (Król 2020:91) whose worldview is predisposed by specific social occurrences or

events such as economic circumstances, historical events, and social-cultural values (Król 2020). Embedded within the discipline of communication science, which is the social scientific study of human communication (Berger et al 2009), the study explores the communication effectiveness of fashion communication methods targeted at Gen Z consumers.

The study is set within the theories of empathic design, the digital affect framework and the digital marketing strategy framework for research. The exploration of these three frameworks offers the study an integrated and critical interpretation of identifying effective digital fashion communication methods for the South African Gen Z cohort. In addition, these theories are explored as an integrated model that allows for evaluating South African fashion retail companies' digital fashion communication and marketing strategies related to Gen Z consumer preferences and experiences.

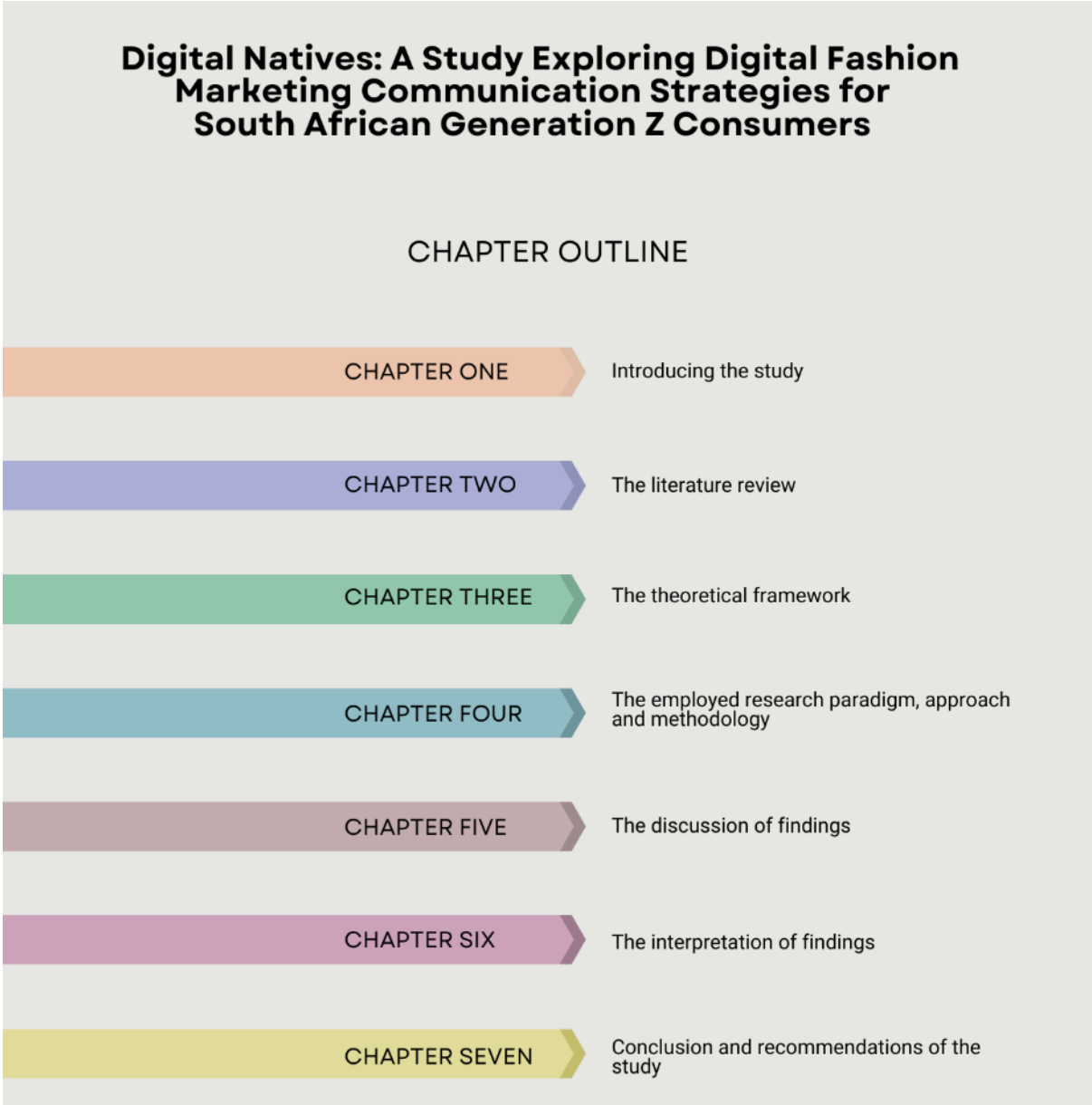
Selected South African operating fashion companies that this study explored as subjects include Cotton On, Factorie, H&M, Legit, Mr Price, Shein, The Fix, YDE and Zara. The nine fashion companies' online digital fashion communication was explored as secondary data to identify the digital communication methods employed to communicate fashion product information to consumers. The selection of these nine fashion companies was established based on the company's key target audience, Gen Z. This confirmation of the respective companies' primary target market also required secondary research on the company profile. A selection of these companies' social media communication of product and consumer-generated collaborative social media content, as well as e-commerce promotional content of product information, is included in this study.

An anonymous fashion consumer survey was created and distributed among South African Gen Z consumers as participants in this study. This survey allowed the study to gain insights into their consumer preferences and experience with digital fashion communication and the use of social media to communicate, market and sell fashion products. A netnographic analysis of both the secondary research of the nine fashion companies and the Gen Z participant's online survey responses was conducted.

The emerging data was interpreted to articulate a conceptual framework conceptually modelled around the empathic design approach, and digital affect and digital marketing strategy framework for research. This framework outlines the levels of effectiveness of the nine fashion companies based on the secondary research and primary research

gathered from the survey responses. By employing mixed research methods, the study focuses on how social media and other digital platforms can be optimised to engage the Gen Z consumer demographic. It seeks to address the gap in understanding Gen Z's digital interactions and economic participation to maximise the effectiveness of fashion marketing strategies and drive value for both consumers and businesses.

**1.1 OVERVIEW OF CHAPTERS**



**Figure 1.1: Chapter overview diagram**

This thesis consists of seven chapters. This body of work seeks to present and support the argument that the emergence of Gen Z as young consumers who possess a significant amount of spending power requires the fashion industry to understand how best to communicate, market and interact with this generation.

Chapter 1 presents an introduction highlighting the significance, scope and contextual background of the study. It also introduces the general layout of the research to make a cohesive argument.

Chapter 2 and 3 discusses the literature review and theoretical framework respectively. Key concepts are argued, such as understanding Gen Z in the context of South Africa and as fashion consumers. The fashion and fashion marketing landscape is also presented as a key concept pertaining to the importance of social media, online communication and interaction between fashion companies and their targeted consumers.

Chapter 4 presents the research methodology and design applied to this study and the sample criteria for selecting the nine fashion companies and Gen Z participants. The process of gathering ethical approval and inviting prospective participants to complete the online anonymous survey is also unpacked in detail in this chapter.

Chapter 5 presents the results and findings from the secondary data of the nine fashion companies, categorised as the first phase of data collection activities, which informed and assisted in formulating relevant questions for the online anonymous survey. Chapter 4 also presents the findings from the survey, which is defined as the second phase of data collection. It will be discussed in the order of the surveyed data.

Chapter 6 provides the interpretation of the results and is discussed in depth using a netnographic analysis to explore the digital fashion communication methods utilised by fashion companies operating in South Africa and to understand the Gen Z consumer preferences and experiences of digital fashion communication of fashion products and the factors that influence their consumer behaviour.

Chapter 7 will conclude the study and offer recommendations highlighting relevant and informed fashion marketing strategies to optimise digital fashion communication that is

effectively communicated and contextually relevant to meet Gen Z consumer preferences and needs.

## **1.2 CONTEXTUAL BACKGROUND OF THE STUDY**

Gen Z, as young and emerging consumers, popularly referred to as 'digital natives', embody the digital age as digitally evolving individuals and consumers. Gen Z are persons born between the late 1990s and today (Cora 2019). A key indicator of Gen Z individuals is that they have been exposed to various forms of digital and online media within their formative years, thus being more inclined to utilise digital technology in all aspects of their lives (Cora 2019). These digital natives were raised during a time that allowed them to interact with up to five screens simultaneously, where they communicated and consumed information. These screens include televisions, laptops, tablets and smartphones (Elmore 2015).

Gen Z are characterised as emerging consumers with the potential to have significant spending power. The total youth spending in South Africa in 2019 amounted to R131.2 billion (McKinsey 2021). Of this number, the total youth spend for children under 12 was R38.7 billion of the overall total; teenagers spend R47.9 billion and young adults between the ages of 18 and 24 spend R44.6 billion (MediaUpdate 2019). In 2024, Gen Z's spending in South Africa was equal to that of Millennials by a third (30%) per generational cohort (Bucholz 2024). It is important to note that currently, the spending majority rests on the parents and young adults (MediaUpdate 2019; Dlamini & Daniels 2023). Bucholz (2024) highlights that developing countries in Africa and Asia with a growing Gen Z population have already acknowledged this generation's purchasing and spending power in the marketplace. These reported numbers highlight the youth's substantial contribution to the South African consumer market. Additionally, their spending power will grow as this generation contributes to the local economy. Understanding the consumer's behaviour in relation to preferences, values, and perceptions is required to ensure marketers are well-informed about Gen Z's spending power.

The fashion industry plays a significant role in the broader social and cultural framework known as the 'fashion system.', which is a concept that encompassing the business of fashion as well as the art, design, production, and consumption of fashion (Mitterfellner 2019). Fashion communicates what is appealing in terms of appearance (Wolbers 2009:172). The fashion industry and the fashion marketing sector thrive on this

phenomenon (Wolbers 2009:172). As the communication of appearance and style allows individuals to illustrate how they want others to perceive them through fashion, one can argue that fashion marketing methods that enable such communication play a vital role. When it comes to exploration, specifically in the fashion market sector in South Africa, research echoes the relevance of this prominent market sector and its impact on the retail economy (Stats SA 2023; Deloitte 2024). The South African retail landscape attributes 4.3% of its retail trade sales to the textiles, clothing, footwear, and leather goods sector, positively contributing to its increase in the 2023 Statistics SA Retail Trade Sales report (Stats SA 2023).

This proposed research investigates the engagement of digital fashion marketing communication among Gen Z consumers in South Africa. Digital marketing communication can be defined as communication among businesses and consumers through digital or electronic media. In contrast to traditional marketing communication, digital marketing communication enables greater and more diverse interactions or dialogues between the source and the recipient (Shankar et al 2022). The digital age phenomenon calls for new methods or modes to communicate with a more digitally engaged and digitally evolved consumer (Lay 2018).

Traditional marketing methods include advertising, publicity, and personal selling (Kuczamer-Kłopotowska & Aycı 2019). Marketing Communications, also termed as promotion, is the coordination of promotional messages and relevant media used to communicate with a targeted market (Kuczamer-Kłopotowska & Aycı 2019). Literature depicts the fashion landscape before the impact of social media, which consisted of consumers being only made aware of fashion marketing information through controlled promotion and publicity created exclusively by fashion organisations (Bendoni 2017). Before social media, the traditional methods of implemented marketing communication resulted in consumers adopting fashion trends at a measured and controlled pace. New communication media and methods in the digital age play a key role in shaping promotional activities and promoting consumer awareness and participation throughout the fashion pipeline (Bendoni 2017).

Studies have begun to explore social media's impact on the marketing of fashion products (Bendoni 2017; Loureiro, Serra & Guerreiro 2019; Siregar et al 2023; Muturi 2024). The rise of social media has introduced new professional skill sets born out of the interaction

and trust formed through these virtual communities, such as social media content creation (Bendoni 2017). Social media is defined as electronic communication, either a mobile application or website for social networking, where users form online communities and share information and ideas through various media formats such as images, videos or text (Merriam-Webster 2021). Social media and social networks are terms known to be used interchangeably (Burns 2017).

Social media refers to sites allowing users to share and create content and connect with others. Social networks refer to the online communities formed by users on social media sites. In earlier years, social media platforms were commonly referred to as social network sites, as these platforms emphasised the networking aspect of the platform (Burns 2017). In recent years, and amongst Gen Z, they have been reported to spend between two to four hours on social media (Mander, Buckle & Morris 2020; Alves 2023). The global Gen Z cohort uses the most popular social media platforms, which are YouTube, Instagram, TikTok and Snapchat. Research has also highlighted that 80% of Gen Z and Millennials have bought a product they viewed or learnt about on social media (Alves 2023). Similarly to global trends, research shows that the use of mobile devices and social media engagement in Africa is high (Casey & Babu 2016; Deloitte 2024).

African countries, such as South Africa and Nigeria, have been identified as being at the forefront of technological advances (Casey & Babu 2016). South African youth are described as technologically advanced (UNFPA 2013), and technology has formed part of their everyday lives (Casey & Babu 2016). In 2021, Gen Z was identified as contributing almost half (40%) of social media engagement and interaction in South Africa, according to Pay Fast (Monzon 2021). The evolution of fashion marketing methods and tools to communicate products to consumers has also been influenced or impacted by social media and the development of social media marketing for relevant digital communication tools.

Fashion marketing is defined as the application of a business philosophy and various relevant methods that are centred on the consumers and the potential consumers of fashion products and services (Babu & Arunaj 2019). The aim of fashion marketing is to strategically achieve the long-term goal of the organisation in relation to sales and profit (Babu & Arunaj 2019). Through social media, Gen Z actively and consistently interacts

on these online platforms, contributing to popular social cultural changes brought about by the advancement in digital technology (Bendoni 2017).

Cultural and social changes increase the frequent consumption of information (Bendoni 2017). This cultural shift directly impacts the constant change in the fashion cycle. The fashion cycle refers to the process in which a new fashion trend is introduced, gains mainstream traction with consumers, declines, and subsequently is rejected once the obsolescence stage is reached (MasterClass 2021). Due to technological advancements and the subsequent impact on the rapid changes in the fashion cycle, Gen Z is not accustomed to waiting for fashion information in monthly subscription magazines, as was the case for previous generations, such as Generation X and Millennials. There is a need to develop innovative and interactive marketing and communication methods to ensure that industries do not miss out on revenue opportunities as Gen Z increases its spending power (Roberts 2016). Thus, this study's problem statement is presented in the following section.

### **1.3 PROBLEM STATEMENT**

The fastest-growing age cohort of online or mobile-commerce shoppers in South Africa are Gen Z consumers aged between 18 and 24 (Monzon 2021). The identified research problem that this study explores is the influence of digital fashion communication on marketing strategies targeted at South African Gen Z fashion consumers. There is an awareness within the marketing industry that innovative and interactive ways of communicating need to be developed for businesses to ensure that they do not fall victim to missed revenue opportunities as Gen Z consumers' spending power increases (Roberts 2016:28). Justin Taylor (cited by Roberts 2016:28) mentions that marketers will have to rethink how they engage with Gen Z. Subsequently, this study aims to explore components of digital fashion marketing strategies targeted at Gen Z consumers to evaluate the effectiveness of the strategies to Gen Z consumer preferences.

Subsequently, it is important that the study understands the contributing factors and sectors in which the research occurs. Although Gen Z consumers are described as global citizens in this digital age, they are still faced with unique societal challenges that dictate their consumer behaviour. An example of these factors is high unemployment levels and differing employment opportunities (Graeme, Rodney & Duffett 2017). These factors are because much of the country's population resides in rural areas, contrasting with

research highlighting South Africa's growing middle class residing in urban areas. The disparities in access to education and employment also highlight the digital divide experienced in the country amongst the population (Graeme, Rodney & Duffett 2017; Axcell & Ellis 2023).

Gen Z are regarded as an emerging consumer in the market by the industry. These suppositions outline a gap in investigating South African Gen Z consumer marketing communication preferences. Studies have identified several consumer shopping and retail preferences (PWC 2016; Gupta & Mukherjee 2022; Nodirovna & Sharif o'g'li 2024). Some of these preferences include the desire of consumers to interact in a more personalised connection with retailers via customer "communities" such as memberships and subscriptions (PWC 2016:). More recent preferences identified in the literature include sustainable purchasing practices and a preference for online shopping (Gupta & Mukherjee 2022). In addition, there is a consumer preference for more connection between retailer and consumer through search engine optimisation that targets and optimises pre-purchasing behaviour (PWC 2023). Overall preferences are towards enhancing the "phygital" shopping experience by ensuring a seamless integration of physical and online shopping experiences for the consumer (PWC 2016; PWC 2023:7). Consumers also mentioned their preference to experience innovative retail and shopping experiences (PWC 2016:4). Globally, and in South Africa, consumers are adopting mobile commerce, also referred to as m-commerce, as the preferred method to do their shopping (PWC 2016; PWC 2023). M-commerce can be defined as shopping via a mobile device and is derived from terminology for electronic commerce (e-commerce) (Parker & Wang 2016:487).

Social media is another key contributing factor or sector in which this research is positioned. As an online fashion communication tool used for marketing product and service information, social media is considered a contemporary and more authentic user-centred approach to communication. During the last decade, there have been noticeable new trends in digital fashion marketing and communication of products and services, and it is important for the industry of fashion to identify those trends with the greatest potential.

Studies have indicated that the high adoption rate of new technologies has revolutionised how companies interact with customers (Straker & Wrigley 2016). The development and evolution of new technologies is a phenomenon that continues to expand as more users

gain easier access to the internet and the digital world. Most of these technological advances are created within the categorisation of digital communication channels (Straker & Wrigley 2016). Using poorly integrated digital communication strategies and channels may introduce a situation of detachment in the relationship between companies and their consumers when a combination of digital communication and outdated or poorly targeted marketing methods are implemented (Straker & Wrigley 2016:277). Furthermore, this argument sheds light on some potential gaps in evaluating marketing strategies and applying marketing methods to ensure that effective and sustainable communication of fashion product information is provided.

#### **1.4 PURPOSE OF THE STUDY**

The African consumer market is experiencing rapid growth in relation to the growing middle class. By 2030, the African consumer market will see over half a billion Africans forming part of the middle class (Fenech & Perkins 2014). Of this middle-class consumer cohort, nearly a quarter (20%) of the African population is currently aged between 14 and 24 and has been identified as the largest contributing factor to Africa's growing middle class. As Gen Z continues to penetrate the consumer market, their consumer preferences for more choices concerning products, services and connectivity will need to be identified and understood by marketing and fashion companies targeting this consumer cohort (Deloitte 2014).

This research investigates digital communication opportunities that the fashion industry can apply to marketing products and services to South African Gen Z consumers. Firstly, the study explores the interaction and consumption of digital fashion communication of Gen Z consumers using online communication and social media as the main data collection tool. It explores the emerging trends that appeal to South African Gen Z consumers when seeking and deciding on where what and how to buy fashion products against existing communication strategies in the South African fashion industry. The study focuses on the components of the digital fashion marketing strategy of nine fashion companies operating in South Africa related to digital fashion communication. Secondly, the study explores consumer satisfaction and behaviour in online interaction and communication related to fashion communication. This evaluation of digital fashion communication by fashion companies and exploration of consumer behaviour in online

communication seeks to identify relevant digital fashion communication opportunities that align with the identified consumer preferences.

The conceptual framework of this study seeks to assess the effectiveness of identified fashion companies that target and sell to the Gen Z consumer cohort. Subsequently, based on the applied model to the study's findings and interpretation, the theoretical framework makes inferences on the identified consumers' interaction with a product, service, or company within digital channels (Wrigley & Straker 2018). In addition, the conceptual framework seeks to guide and inform the creation of digital communication strategies that identify relevant digital channels of communication based on consumer insight and interaction.

## **1.5 RESEARCH OBJECTIVES AND QUESTIONS**

The main objective of this research is to identify and evaluate the level of effectiveness of digital fashion marketing and communication methods for fashion companies operating in South Africa that target Gen Z consumers. Extending from this research objective, the main question the study seeks to answer is: What are the gaps in digital fashion marketing and communication methods currently being used by South African fashion retail companies for Gen Z consumers and what could improve consumer satisfaction?

The following sub-research questions are posed to guide the study further:

- How can social media positively or negatively impact digital communication in marketing fashion products and services to Gen Z consumers?
- What criteria related to digital fashion communication methods are expected by Gen Z consumers that are influenced by societal factors and inform their purchasing decisions?
- How can the design of a model evaluating the effectiveness of digital fashion marketing strategies targeted to Gen Z inform and develop relevant digital marketing communication strategies for Gen Z fashion consumers?
- What emerging trends should the industry adopt to maximise their marketing results with Gen Z consumers?

## 1.6 STUDY RATIONALE

The digital age phenomena require new ways of communicating with a more digitally evolved and engaged consumer. Literature's key characterisation of the Gen Z cohort is that they are the first generation to interact and engage with digital technology within their formative years. The digital age came with efficient and easy access to information through technology, also known as the information age (Hayes 2021). The digital age and information age have introduced digitally astute and informed consumers as information on the internet is more accessible. It has also developed the culture of social media users creating and sharing their own content. User-generated content (UGC) is defined as media content curated or generated by the public or consumers and distributed on the internet (Nagy & Koles 2016:2). The types of UGC associated with digital marketing include blogs or discussion forums, crowdfunding, comments, posting of pictures and videos, reviews and networking (Naeem & Ozuem 2022). Literature has reported that the UGC created by users of social media is regarded as the "lifeblood" of a social media application or platform (Obar & Wildman 2015:7). The role of the consumer in today's digital age is no longer one of passive compliance and consumption (Lay 2018). Consumers in the digital age have evolved into empowered and informed co-creators of the products and services that they consume.

In literature, this concept of a non-passive consumer, who is no longer placed at the last step in the retail cycle, is referred to as a consumer-centric approach instead of a product-centric one. A product-centric approach can be understood as how designers and marketers prioritise the processes and manufacturing outcomes of the product before distribution to retail for consumer consumption (Luh, Ma, Hsieh & Huang 2012). Some research explores consumer hedonic<sup>1</sup> experiences such as fashion shopping in physical stores. However, with shopping having advanced into the digital age, the user or consumer experience has subsequently changed with the advent of e-commerce platforms (Wrigley & Straker 2018). Therefore, an inquiry into the effectiveness of

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<sup>1</sup> Hedonism refers to the pleasure or happiness experienced when doing certain things (Merriam-Webster 2021) such as shopping for fashion products.

marketing strategies and methods of digital fashion communication is relevant, as evaluated against Gen Z consumer preferences for digital fashion communication.

Digital technology has disrupted the traditional communication model for companies (Wrigley & Straker 2018). Conventional or traditional one-way, company-dominated communication is now a two-way dialogue and collaboration, creating a power shift between businesses and customers and leaving the customer largely in control (Wrigley & Straker 2018). This is a customer-centric approach to product and service communication in marketing.

Studies have highlighted the importance of consumer-centric design in creating products or services and marketing that product or service. This consumer-centric design is because the encoding of marketers may not meet consumer preferences. This lack of effective encoding alludes to the notion that successful product communication tools from a marketer's perspective may not be well-received by the targeted consumers in the marketplace. Poor reception of the product communication indicates that there could be a gap between designers' and marketers' understanding of consumer preference.

The digital age has brought a new attitude to a business strategy that centres the consumers' needs to deliver and create value. As digital technology becomes more intertwined with everyday activities, a shift in marketing and brand communication is also evident in recent years (Straker & Wrigley 2016). Kotler, Kartajaya and Setiawan (2010) state that marketing is no longer as simple as creating a product and brand identity and determining product value on behalf of the consumer. Today's consumers are well-informed and can make comparisons between similar product offerings (Kotler et al 2010). The consumer defines the value of a product. The shift in marketing approaches has moved from a product-centric to a consumer-centric approach.

Literature has demonstrated the importance and relevance of understanding the Gen Z cohort (Dlamini & Daniels 2023; PWC 2023; Bucholz 2024). Studies were done to understand Gen Z individuals in the workforce (Dolot 2018; Mawhinney, Betts & Gomez 2019). Research within the education sector has studied the appropriate methods of communicating and learning for this cohort of digital natives (Janschitz & Penker 2022; Reid, Button & Brommeyer 2023). The marketing sector has also explored the Gen Z cohort's consumer behaviour to better target their brand and products (Roberts 2016; Maguire 2020; Munsch 2021; Maziriri et al 2023; Vasan 2023).

The study's intersection of marketing and communication is a prominent concept that requires a clear distinction in the positioning of this study in the discipline of communication. While the study's findings and interpretations inform practice and strategy related to fashion marketing, the exploration of various communication methods and media is the central focus of the study. Communication can be defined as the process of transmitting information, ideas, attitudes, or emotions from one party, the sender, to another, the receiver (Eagle, Czarnecka, Dahl, & Lloyd 2020). As a discipline, communication science requires technical planning through an implemented process characterised by strategic and relevant execution. One such process is the Shannon-Weaver Model of Communication. The communication model can be understood as a system with interconnected elements (Eagle et al 2020).

Element one of the model is the sender, which can be a brand, company or marketer. The information or message is element two, and it is uncoded as the content, which could refer to various media, such as an advertisement or a social media post. (Eagle et al 2020). The third element is the act of encoding the message or content, which is concerned with the associated symbols, words or visuals that are associated with the message by the sender and the receiver (Eagle et al 2020). It is also important to consider how the message is then communicated or sent to the receiver as the fourth element, also known as the target market or audience. Channels could include social media, television or face-to-face. Once the message is received via the relevant channel, a decoding of the message takes place where socially contextual interpretations and inferences are made by the target audience (Eagle et al 2020). A subsequent response or feedback from the target audience is expected as the fifth element, which could be characterised by the consumer making a purchase or further engaging with the brand.

The intersection of communication and marketing is well contextualised in the Shannon-Weaver model of communication as the activities related to communication where the transmission of information, ideas, and emotions coincide and support marketing approaches and activities to ensure the successful sale of a product or service to the target audience. The model further emphasises a sixth element which is referred to as noise and characterises any interference such as competing advertisements, misinformation or distractions (Eagle et al 2020).

Embedded in the discipline of communication, this research explores and evaluates the effectiveness of digital fashion communication methods and media targeted at Gen Z consumers. The findings and interpretations of the analysis of the nine identified fashion companies and the responses from Gen Z fashion consumers culminate into proposed strategies and opportunities for fashion companies to increase consumer satisfaction. The relevance of this research lies in the potential innovative online communication methods and strategies developed upon applying the designed conceptual framework and the subsequent delineations made through the study's framework.

## **1.7 CONCEPTUAL MODEL AND THEORETICAL FRAMEWORK**

The theoretical framework for this study explores and combines three critical theories that align with this study's objectives. The three include the empathic design approach, the digital affect and digital marketing strategy frameworks for research.

The empathic design approach departs from the human-centred design approach (Postma et al 2012). The empathic design approach is a critical design approach aimed at exploring the conceptualisation and development of interactive systems. It seeks to ensure that systems are practical, relevant and beneficial by focusing on users and designing for their needs and requirements (Bouck 2013).

Dorothy Leonard and Jeffrey Rayport (1997) established the five-step process of the empathic design approach that companies can apply to business and marketing. Step 1 observes the targeted consumers interacting with the potential product or idea. Step 2 requires that the researcher and designer interpret the data and inferences expressed by the consumer to delineate the identified problem and to develop possible solutions. In Step 3, the researcher and designer must analyse and reflect upon the data and insight gathered to begin product brainstorming (Luh et al 2012:233). In Step 4, product prototyping can occur after brainstorming ideas (Luh et al 2012:234). Step 5 involves the consumer's engagement and using the product to test and review (Leonard & Rayport 1997:108).

Karla Straker and Cara Wrigley (2016:279) consider a new approach to marketing and business strategies that includes the customer as a valuable factor in creating and delivering value in products and services. The digital affect framework is designed to explore and understand consumers' interaction with a product, service or company within

digital channels (Wrigley & Straker 2018). This framework is designed to guide and inform the creation of digital communication strategies that identify relevant digital channels of communication based on consumer insight and interaction. The digital affect framework demonstrates a direct relationship between cognition, emotion, and behaviour.

It is essential to understand crucial aspects or concepts considered in a digital marketing strategy to assess the marketing strategies of identified South African fashion companies or brands. Kannan and Li (2017) explain the development of a research framework motivated by digital marketing, which emphasises touchpoints in the marketing strategy and implemented processes. The framework for research in digital marketing “identifies the key touchpoints in the marketing process and strategies where digital technologies are likely to have a significant impact” (Kannan & Li 2017:24). The framework demonstrates this by identifying three key areas, which include the socio-economic environment that the marketing strategy is created, the company and their core marketing concept, and outcomes that ensure value for the consumer and the company or firm (Kannan & Li 2017). Within these three main areas of the digital marketing strategy, the framework considers the impact of digital technology. The digital marketing strategy provides an approach to understanding how the digital component of marketing communication impacts the marketing strategy of a company.

The insights from the researched frameworks are better seen as an integrated model for evaluating consumer preference and how digital fashion marketing strategies can best align with this emerging consumer segment. In addition, the digital age and Gen Z being digital natives further support the development of an integrated conceptual framework exploring these concepts. The outlined conceptual framework of this study seeks to assess the current digital marketing strategies and digital fashion communication methods of nine fashion companies by evaluating key marketing strategy components against the frameworks’ criteria.

The key evaluation criterion is the empathic design approach, which is explored through empathic inferences from the data collected in the first and second phases of data collection. The approach of the model identifies the company’s digital stimuli to observe the company’s value proposition and make empathic inferences on the digital hedonic response. Lastly, the model seeks to evaluate the external marketing contributing factors that informed the marketing strategy, which takes into consideration the company

environment, such as market research of the consumer and retail space, the 4Ps (price, product, promotion, and place) and how these factors correlate to the digital hedonic response, specifically brand loyalty or value perception by the consumer.

## **1.8 RESEARCH PARADIGM**

This study adopted an interpretivism epistemology characterised by the subjective exploration and interpretation of knowledge and truth based on people's cultural and historical experiences (Ryan 2018). Collins (2018) posits that interpretivism rejects objectivism. However, at the same time, interpretivism is not merely a subjective account of a phenomenon but rather an account essentially reflecting significant qualities of culture and the phenomenon.

Set within the interpretivism epistemology, this study explores the consumer behaviour of Gen Z fashion consumers to interpret and evaluate the effectiveness of targeted digital fashion marketing strategies. The influence of hermeneutics aligns with this research as studying text or documents of fashion companies' marketing strategy and communication was done. The theory of *verstehen* was incorporated as the study focuses on producing new knowledge about digital marketing strategies targeted at South African Gen Z fashion consumers and identifying effective measures to enhance companies' marketing strategies. This study's theoretical framework is based on understanding and interpreting the meaning of marketing strategies and marketing communication. The implications of the conceptual framework applied to existing marketing strategies allow this study to explore opportunities for effective consumer-centred marketing strategies for Gen Z consumers.

## **1.9 LIMITATION AND MOTIVATION FOR THE STUDY**

The motivation for this study arises from the increasing importance of understanding consumer behaviour among Gen Z, a demographic of digital natives. With the digital landscape playing a crucial role in retail, this study aims to explore how South African retailers engage with Gen Z through digital platforms and social media. By examining marketing strategies, digital stimuli, and consumer interactions, the research provides actionable insights into effective approaches for reaching these digitally astute and socially aware citizens. Additionally, the study addresses a gap in the literature on the

specific challenges and opportunities for retailers targeting Gen Z in South Africa, a market with unique socio-economic and cultural factors.

The limitation of the study lies in its reliance on publicly available data from websites and social media platforms, which may not provide a complete picture of retailers' internal strategies or consumer demographics. The analysis is also restricted to a sample of nine South African retailers, which, while carefully selected, may not fully represent the diversity of the retail sector. Moreover, the study's focus on digital stimuli and social media engagement excludes traditional marketing channels, potentially overlooking other influential factors in consumer decision-making. Finally, the interpretation of digital engagement, such as comments and likes posted on social media, is inherently subjective and may not accurately capture the intent or sentiment of consumers. These limitations highlight areas for further exploration and provide context for interpreting the findings.

#### **1.10 DEFINITION OF KEY CONCEPTS FOR THIS STUDY**

**Digital fashion communication:** Digital fashion communication refers to an aspect of the communication sciences that intersects fashion and the information and communication technology (ICT) sectors (Cantoni et al 2020a). Research on digital fashion communication explores components of how fashion is communicated in the online or digital environment in correlation with traditional offline media channels (Sabatini & Kalbaska, 2019). The use and application of the term 'digital fashion communication' in this study refer to exploring various digital communication channels of fashion companies. These online channels include websites, social media pages, and the content or media generated and published on these channels. Online communication is expected to have a seamless correlation to offline media communication that may be presented in traditional brick-and-mortar settings (Yang & Lee 2018; Cantoni et al 2020; Nobile et al 2021). In some instances, fashion companies operating in an omnichannel commerce environment must integrate online and offline systems for an enhanced and convenient shopping experience.

In this study's context, digital fashion communication encompasses components of how fashion-related products are communicated through the digital or online marketing channels of South African fashion retailers. In addition, the online marketing media and methods are identified and explored. The exploration of digital fashion communication in

this context aims to evaluate digital fashion communication against the consumer preferences of Gen Z consumers and identify opportunities for innovative consumer-centric digital communication.

**Digital marketing strategy:** Digital marketing is an adaptive, technology-driven process by which firms collaborate with key stakeholders such as customers and partners to jointly create, communicate, deliver, and sustain mutual value. (Kannan & Li 2017). The digital marketing strategy is subsequently understood as an implemented guide of processes that assess and plan specific goals achievable through online channels (American Marketing Association 2021; Kannan & Li 2017). The marketing strategy aims to maintain value for all relevant stakeholders by ensuring the respective stakeholders' objectives are understood and by implementing processes that ensure satisfaction and value. Digital fashion communication is concerned with online communication channels and media.

**Consumer-centred approach:** A consumer or customer-centred approach is considered a new response to a business strategy that incorporates the consumer as a collaborator or driver in delivering value. Incorporating such approaches allows companies to sense, understand, interpret, respond, and evolve their strategic position in a changing environment (Straker & Wrigley 2016; Gupta & Ramachandran 2021; Toivanen 2021; Nogueira, Silva & Gomes 2023). The origin of such an approach lies in using crucial design approaches, such as human-centred design and empathic design, where empathy and emotion assist in the design development process (Leonard & Rayport 1997; Postma et al 2012). In the context of this research, the empathic design approach is applied to determine the preferences of Gen Z fashion consumers for digital communication related to marketing products (Leonard & Rayport 1997). The approach posits the needs and preferences of Gen Z as a crucial element to the enquiry and identification of user-centric strategies for digital communication of fashion products and services.

## CHAPTER TWO: LITERATURE REVIEW

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Chapter 1 presented the background and context pertaining to this study that explores South African Gen Z consumer behaviour related to digital fashion marketing, the influences upon it, and the relevant differentiated opportunities for marketing to South African Gen Z fashion consumers. This study seeks to identify successful marketing communication tools, strategies, and opportunities to communicate product and service information to Gen Z consumers through digital interfaces and platforms.

This chapter presents the literature review to support the argument made in this study. The literature review presents a contextual overview of the concept of generational cohorts and the research areas influenced by this concept. This discussion then leads to an in-depth discussion of the Gen Z consumer cohort from an African and South African perspective. Important factors are reviewed, such as understanding the Gen Z consumer cohort, specifically fashion consumers. An understanding of the marketing and fashion marketing landscape is explicated with a focus on various relevant fashion marketing methods, such as social media marketing and the distinction of digital fashion communication.

### **2.1 AFRICAN CONSUMER MARKET**

The African consumer market comprises over 1 billion diverse and heterogeneous consumers and is predicted to grow and reach 2.5 billion in population by 2050 (Makhita 2018; United Nations 2023). The most commonly applied segmentation of this market is by income and culture. The African consumer market is mainly attributed to the different income levels and the multicultural nature that Africa embodies (Makhita 2018; Madinga et al 2024). Other impactful and nuanced differences contributing to the dynamic nature of the African consumer market are geographical and language differences. These identified segmentation characteristics require companies seeking to penetrate and remain in the African consumer market to have a precise understanding of consumer preferences, values and perceptions (Adeola et al 2021; Chikweche et al 2024; Chikweche, Lappeman & Egan 2024; Madinga et al 2024).

The technological advances brought about by the digital age and globalisation have ensured that companies are able to better target marketing communication to their

identified consumers (Oriekhoe et al 2024). Before these advances, the trend of cultural Westernisation among African consumers caused changes in consumer values, resulting in an adoption of Western consumer values among Africa's growing middle class (Makhita 2018). These consumer values are characterised by an individualised consumer model instead of close relations and "the consumer group" being more important than the individual consumer (Makhita 2018:61). In the present day, technological advances expose consumers and marketers to more information and product variety. While marketers are better equipped due to technology, technology has also evolved consumers and exposed them to global product competition. Due to this, African consumers expect good customer service and high-quality products (Makhita 2018). Although literature alludes to the Western influence on African consumer preferences, African manufactured goods are not considered less valuable, according to the African consumer market. Madinga et al (2024) identified that ethnocentrism significantly affects purchase intentions among South African consumers, meaning that consumers who strongly prefer domestic or locally produced products are more likely to avoid foreign goods. Furthermore, the study by Madinga et al (2024) posits that its findings provide valuable insights for businesses in South Africa, helping them understand consumer behaviour and refine marketing strategies to promote local products or counteract consumer biases against foreign goods.

Literature has highlighted five key components attributing to the rapid growth amongst African consumers (Makhita 2018; Adeola et al 2021; Njathi & Watkins 2024). These components include the increase in the middle class, the explosion in population growth with its concomitant growing youth consumer market (Chikweche et al 2024), the results of urbanisation, and the acceptance of digital technology at a rapid and consistent rate (Makhita 2018; Chikweche et al 2024; Njathi & Watkins 2024).

The rapid growth of the African consumer market will see over half a billion Africans forming part of the middle class by 2030 (Fenech & Perkins 2014; Chikweche et al 2024) and up to 1.1 billion by 2060 (Africa Dialogue Series 2023). In 2014, almost a quarter (20%) of the African population was between 15 and 24 (Africa Dialogue Series 2023). This has been identified as the largest contributing factor to Africa's growing middle class, which corresponds with recent statistics monitoring young people's growth in the middle class (Melber 2022). Research exploring sub-Saharan Africa's growing middle class shows how young people will make up most of the middle class (United Nations 2023).

Studies have reported that “Africa’s youth population is expected to double by 2050, making it the youngest continent in the world” (Africa Dialogue Series 2023:9). As Gen Z gains more spending power, they were identified as seeking more choice in relation to products, services, and connectivity (Fenech & Perkins 2014; Africa Dialogue Series 2023; Muturi 2024). In light of the aim of this study, a narrower focus on the Gen Z consumer market in South Africa requires discussion.

## **2.2 GENERATIONAL COHORTS**

The Gen Z cohort is described as emerging consumers (Priporas, Stylos & Fotiadis 2017; Mulyani, Aryanto & Chang 2019; Axcell & Ellis 2023; Maziriri et al. 2023). This description suggests that societies are entering a new era and are experiencing a generational evolution or difference relative to the generations that came before Gen Z. These generations include the traditionalist generation born from 1922 to 1945 (Turner 2015). Followed by the Baby Boomer generation born from 1946 to the early 1960s (Dias 2003). The last two generations preceding Gen Z are Generation X, born from the early 1960s to the early 1980s (Dias 2003), and Generation Y or Millennials, born from the early 1980s to the early 1990s (Turner 2015). These categorisations are known as social generations (Strauss 1991). Generations, by definition, consist of individuals “born at a given time” (Król 2020:91) whose worldview is influenced by certain social occurrences such as historical events, economic circumstances, and changes in cultural values (Król 2020). It is also important to highlight that Gen Z is now followed by another generational cohort known as Generation Alpha. Generation Alpha refers to individuals born from 2010 onwards (Huth 2020; Spychalski 2023).

Strauss (1991) theorises that social generations are identified by three main criteria: age, associated historical events, social trends and location in history. The theory of social generations establishes a period in which a cohort was born in conjunction with key socio-economic events that shape the formative stages of the cohort’s life (Dias 2003; Demeijer & Stoffels 2019; Dick 2019; Król 2020). The theory of social generations further identifies the influences that underpin the way one perceives and interacts with the world (Strauss & Howe 1992; Demeijer & Stoffels 2019). Generational theory emphasises generational differences as each identified generational cohort would present behavioural attributes that represent a common or shared experience (Pavlič & Vukić 2019). Therefore, the

application of this theory is maintained to explain the characteristics linked to an identified generation's values, motivations, attitudes, and social competencies (Król 2020).

Generational theory aims to categorise the birth of individuals born within a certain period with key defining historical events that took place at a specific time. This categorisation subsequently fundamentally impacts the individual's beliefs and values living through those historical events (Dabija & Băbut 2019). Understanding a generational cohort's beliefs and values contributes to better communication of products and service information from a marketing and branding perspective (Dimock 2019; Thangavel, Pathak & Chandra 2019; Vukić 2019). From a global perspective, the Gen Z cohort has lived through the global recession within the early to mid-2000s (Hulyk 2015; Chappelow 2020), and more recently, since 2019, they have had to adapt to a world affected by the worldwide health pandemic of COVID-19. Coronavirus, also called COVID-19, is an infectious disease caused by a newly discovered respiratory virus in 2019 (Business Wire 2020). Discussion of the general characteristics related to the Gen Z cohort may allow for a better understanding of this generation for marketing and communication purposes and is discussed in section 2.2.1.

### **2.2.1 Gen Z cohort**

The study of Gen Z requires an investigation of relevant concepts that speak to further exploration of the study. It is vital to understand the key characteristics or attributes of the Gen Z cohort in relation to the generations which came before Gen Z and what sets this generation apart. A key defining attribute of this generation is that they are the first generation to grow up with the internet being a prominent part of their formative years (Bendoni 2017; Thangavel, Pathak & Chandra 2019; Munsch 2021). Digital technology is an intrinsic part of how Gen Z navigates the world (Munsch 2021). With advanced digital and technological developments, innovations, and efforts towards creating global citizens who are connected in the virtual world, internet users are able to seamlessly connect and interact. Gen Z is described as digital natives who are not confined to the surroundings of their geographical location and co-exist within a borderless virtual reality (Agárdi & Alt 2022; Harahap, Marpaung & Asengbaramae 2023; Reid, Button & Brommeyer 2023).

The generational cohort of Gen Z was born from the mid to late 1990s to roughly 2010 (Król 2020; Harahap, Marpaung & Asengbaramae 2023). The time period or boundaries

in relation to the birth date of Gen Z are reported to be 15 years (Król 2020). Gen Z were born within a period of rapid digital and technological change, and they have grown up in tandem with technologies evolving into the digital age. Historical events that defined and shaped the Gen Z cohort would not be complete without including digital technology and its influence on their everyday realities (Bendoni 2017; Cheung et al 2017; Król 2020; Harahap, Marpaung & Asengbaramae 2023). Gen Z is the first generation that has never lived in a world where the internet did not exist (Gomez, Mawhinney & Betts 2019). This results in the interaction with digital technologies becoming second nature.

Dolot (2018) sought to identify how Gen Z individuals characterise themselves and what attributes define this generation. Dolot's (2018) research explores Gen Z from the perspective of the labour market and the necessity for new approaches to interacting with Gen Z, respectively, to other generations. Dolot (2018) reinforces how the study of Gen Z is a relatively new area of research due to this generation being the youngest generational cohort in the labour market.

Digital technology and its evolution and subsequent impact on society are undeniable (Dolot 2018; Chappelow 2020; Bendoni 2017). As a result of this, generations such as Gen Z have been reported to co-exist in the real and virtual worlds and perceive these two worlds as complementary to one another (Dolot 2018). In addition to Gen Z growing up and living in a world of easily accessible digital advancements, they hold the ability to quickly source information online in high regard. This has also created a culture of continuously sharing information within their virtual communities, mainly through social media (Dolot 2018). The interaction on social media includes commenting on socio-economic occurrences and issues on which they have an opinion. Social media is used as a platform to manifest their opinions and attitudes. In the same light, Gen Z not only consumes and shares the content found online, but they also create and share their own content as they have been described as a cohort that creates and cultivates social environments through the virtual space of social media (Bendoni 2017).

When it comes to Gen Z and overall cognitive abilities, it has been reported that due to their constant multitasking on devices, consuming and creating content simultaneously, their long-term concentration and memory are affected (Dolot 2018). Gen Z individuals process information quickly. In order to retain the shorter attention span of Gen Z while trying to communicate, the information being consumed must be characterised by short

bursts of information and text in the form of visual media such as images, short videos, or emojis (Hulyk 2015). Another characteristic that Gen Z embodies is an experimental and explorative nature. This trait may be influenced by key socio-economic events that impacted this generation's worldview, such as the global recession between 2007 and 2009 (Chappelow 2020). Also referred to as the Great Recession, which saw an economic downturn in economically developed countries like the United States and subsequently, the recession ensued in the rest of the world (Chappelow 2020). As a result, Gen Z has been reported to be a generation of individuals who prioritise financial security over personal fulfilment (Gomez, Mawhinney & Betts 2019). Having witnessed and lived through the aftermath of the recession, this generation is eager to explore opportunities for entrepreneurship (Gomez, Mawhinney & Betts 2019).

In a series of studies, Deloitte gained insights from the global Millennial and Gen Z cohort from ten countries within Asia, Europe, and North America (Deloitte 2019). The survey reports on the lack of trust that Gen Z respondents have in traditional institutions. A third (30%) have no (0%) trust in traditional media (Deloitte 2019). A contributing factor is the political conversations that are reported in the media, which have likely contributed to increased scepticism among this generation (Deloitte 2019a). Similar sentiments were presented in the 2024 Gen Z and Millennial survey, with a third (30%) of Gen Z expressing uncertainty about social and political situations as many countries approached pivotal elections (Deloitte 2024). Almost half (41%) of Gen Z respondents have no trust in political leaders, and almost half (49%) have no trust in religious leaders (Deloitte 2019). The majority, including Millennials, said that political leaders and religious leaders are "failing to have a positive impact on the world" (Deloitte 2019:8). These numbers reflect distrust of these people and their institutions, consistent with earlier and recent survey versions (Deloitte 2019; Deloitte Global 2020; Deloitte 2024). Furthermore, the conclusion is that the consistency in views over the last few years highlights a need for change within these traditional institutions to win over the Gen Z cohort (Deloitte 2024).

The top three concerns for Gen Z respondents in the 2019 Deloitte study include climate change and the preservation of the environment, unemployment, and terrorism (Deloitte 2019). In March 2019, close to a million secondary students in 125 countries protested against the effects of climate change with the aim of motivating politicians to act on climate change (Deloitte 2019). This global protest was led by the Gen Z cohort, who

came together for a common cause. With over 2,000 protests taking place globally, this act of demonstration was empowered and elevated through the virtual world, where communities are formed with the advancements of digital technology (Deloitte 2019). In 2024, the most prominent concerns expressed by almost a quarter (20%) or more respondents include cost of living, unemployment, and climate change (Deloitte 2024).

The Deloitte Gen Z and Millennial survey highlights that respondents with a tertiary education were more likely to be concerned with societal problems such as political instability and climate change (Deloitte 2019). By contrast, respondents with a high school qualification prioritised concerns such as unemployment, personal safety, and health care (Deloitte 2019; Deloitte 2024). In addition, Gen Z respondents chose not to pursue higher education due to financial constraints or personal or family matters (Deloitte 2024). This analysis of the data highlights the importance of understanding the unique socio-economic influences as well as the accessible resources available as a result of various socio-economic realities in various parts of the world (Deloitte 2024). Furthermore, the analysis highlights the value of this study, which explores South African Gen Z consumer behaviour, external influences, and possible opportunities for communicating product and service information through digital platforms. Although Gen Z is said to be the first prime example of global citizens and digital natives (Harahap, Marpaung & Asengbaramae 2023; Reid, Button & Brommeyer 2023), there are still factors which need to be considered when looking at this generation within the context of their environment.

Another crucial concern across all the Gen Z respondents is the risk of cyber fraud and the importance of cybersecurity (Deloitte 2019). Three-quarters (76%) fear being a victim of cyber fraud, fear identity theft (75%), and are concerned with how organisations share their consumer's personal data with other organisations (72%) (Deloitte 2019). These high percentages further verify the literature that described Gen Z as digital natives with a real understanding of how the internet can bring communities together and how the internet can be used to exploit unwitting users (White 2022; Lopez Mendoza et al 2023). Digital technology in the digital age has allowed for many advancements, such as social media and the virtual communities created on these platforms. Social media is beneficial to individuals as it allows people to stay in touch with friends, make new connections, and access information (Deloitte 2019). The disadvantage of social media is how it is also used with malicious intentions such as cyber-bullying, spreading propaganda and live-

streaming violent crimes (White 2022; Lopez Mendoza et al 2023). The survey brings to the forefront how Gen Z may have a “love/hate relationship” with social media and their smart devices (Deloitte 2019:20).

More than half (59%) of Gen Z respondents said they would be happier if they reduced the time spent on social media. There is a link between screen time on a digital device, such as a smartphone, laptop, or TV, and the user’s mental and social well-being (Przybylski & Weinstein 2017). This link is especially seen in youth ages 15 to 29 (Rawath, Satheeshkumar & Kumar 2019). Extensive screen time on social media has been reported to have a negative impact because digital activities replace alternative beneficial activities, which include exercise, socialising with friends and family, or reading books. The analysis given in the 2019 Deloitte study supports previous studies’ claims of the adverse effects of an over-usage of social media and furthermore corroborates the numbers presented (Prakash Yadav & Rai 2017; Korombel & Ławińska 2019; Maguire 2020; Alves 2023; Skiera 2024). Two-thirds (63%) of the Gen Z respondents said they would be healthier if they spent less time on social media, and half (54%) said that social media does more harm than good (Deloitte 2019). Although over half (50%) expressed their concerns with the over-usage of social media, fewer (38%) said that they would like to stop using social media (Deloitte 2019) completely.

The advancements in digital technology have figuratively brought down the barriers by creating a virtual world where people from different parts of the globe can connect and interact in a digital space (Dolot 2018; Reid, Button & Brommeyer 2023). Gen Z has grown up in this digital era, so digital technology is an important part of their everyday life (Harahap, Marpaung & Asengbaramae 2023; Reid, Button & Brommeyer 2023). Gen Z consumers, although described as being global citizens of this digital age, are still confronted with unique societal challenges that dictate their values, aspirations, and consumer behaviour (Harahap, Marpaung & Asengbaramae 2023; Reid, Button & Brommeyer 2023).

Figures 2.1 and 2.2 are charts overviewing the 2024 Deloitte Millennial and Gen Z consumer survey conducted in 44 countries in Eastern and Western Europe, Asia and Africa (Deloitte 2024). Similar sentiments, as per the 2019 report, are outlined regarding the concerns of Gen Z, which include cost of living, unemployment, and climate change. In addition, concerns regarding mental health resonate with previous reports on the

impact that excessive social media usage has on mental health (Deloitte, 2024). The figures highlight the low percentage of Gen Z respondents who are optimistic that there will be improvements within the next 12 months around their respective countries' economic situation, personal finance, and socio-political situations (Deloitte 2024).

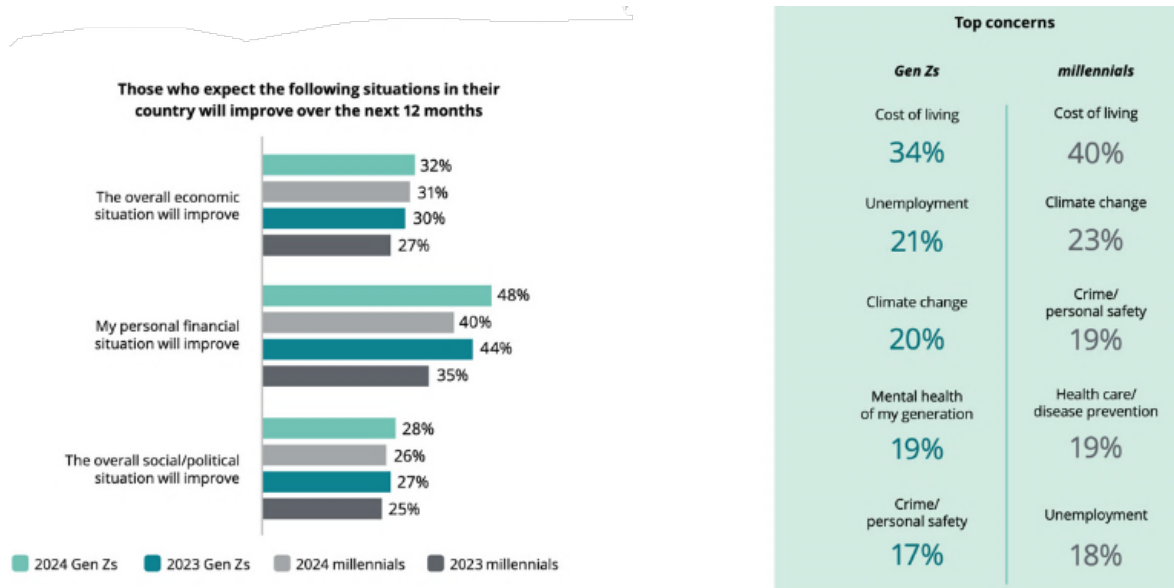


Figure 2.1: Top concerns of Millennials and Gen Zs (Deloitte 2024)

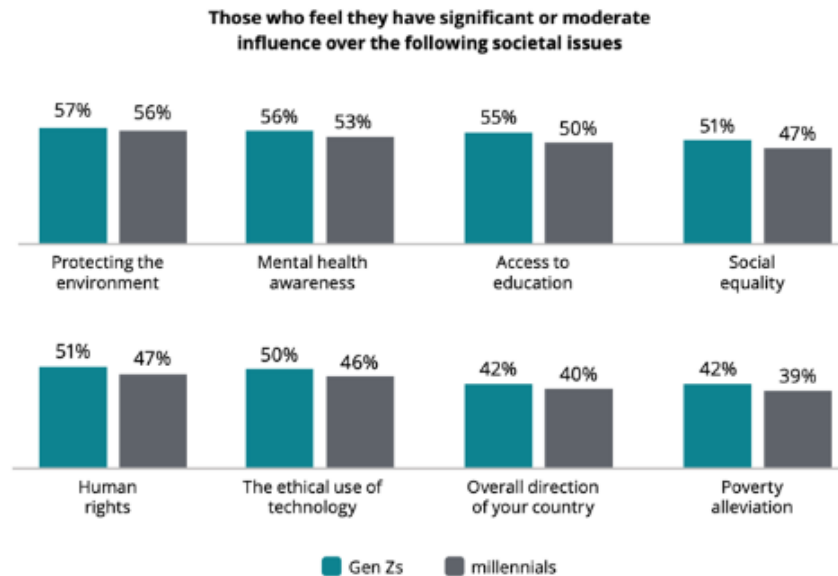


Figure 2.2: Sense of control over societal issues of Millennials and Gen Zs (Deloitte 2024)

### **2.2.2 Gen Z Cohort in South Africa**

The Gen Z digitally oriented way of navigating life is a key signifier that unifies Gen Z from a global perspective. A third (27.5%) of South Africa's population is between the ages of 15 and 34, leading to more questions about the possibilities of how the future will look for this emerging generational cohort (Department of Sports, Arts and Culture 2024; Stats SA 2024). Gen Z are described as digitally oriented and have greater freedom of expression, which is amplified with the use of digital platforms to support their sense of community and interaction (Dolot 2018; Harahap, Marpaung & Asengbaramae 2023; Reid, Button & Brommeyer 2023). The characteristics of Gen Z globally are not significantly different from those of the South African Gen Z cohort. Global reports highlight the effect of the global recession and how this informed Gen Z individuals' way of viewing the world and what is important to them (IBM 2017; Dolot 2018; Brill 2019). In South Africa, this is no different; with staggering unemployment figures and the lasting impact of COVID-19, this generation has been identified as adept at seeking opportunities and overcoming adversity (Transunion 2020; Maziriri et al. 2023).

The Deloitte study over 2020 highlights how the Millennial and Gen Z cohorts have been met with trying circumstances (Deloitte Global 2020) due to experiencing and living through a global recession during their younger childhood years to as young adults experiencing life during the pandemic of COVID-19. Since December 2020, South Africa officially reported one million positive COVID-19 cases (EWN 2020). COVID-19 has had a lasting global impact from a socio-economic perspective. Many countries have reported an increase in job loss as many industries were affected by COVID-19 (Cambridge Dictionary 2021). In 2023, the global unemployment rate dropped to its lowest level since the start of the pandemic, with little positive change to be reported in the near future (International Labour Organization 2024).

With the pandemic changing operations and social settings, communities have had to adapt their way of living and working during and since COVID. Gen Z has reportedly been experiencing more mental health-related issues as a result of the pandemic and the stress related to the uncertainty of the future (Deloitte 2020). With the oldest of the Gen Z cohort either studying at university or working, concerns about unemployment are increasing. More time is spent on digital devices for school purposes as Gen Z teaching

and learning incorporate learning online (Mhlanga & Moloi 2020a; Alves 2023; Mhlanga & Moloi 2020b).

Munsch (2021) reports on a study investigating how digital marketing strategies can effectively capture the attention of Millennials and Gen Z consumers. The study reported on the most effective advertising strategies to implement for the Millennial and Gen Z consumer cohort. Some successful strategies included short-form content that is 15 seconds or less to capture the consumer's attention (Munsch 2021). Another effective strategy noted was the collaboration with social media influencers or content creators over traditional celebrity endorsements (Munsch 2021). Munsch's (2021) study explores the effectiveness of digital marketing communication and advertising among Millennial and Gen Z consumers in the United States. The results on effective marketing strategies do not identify a specific discipline or retail sector and rather reference marketing methods for consumable products such as food and non-consumable products such as fragrances (Munsch 2021).

The study of Gen Z consumer perception related to the impact of promotional marketing using digital or online communication in India presented that digital communication marketing provides convenient and useful information to consumers (Vasan 2023). The study specifically highlighted the fun and humorous element of marketing communication, which highly attracted Gen Z respondents. Moreover, the study by Vasan (2023) revealed that digital marketing communication significantly impacted the purchasing decisions of Gen Z consumers in India. Similar to Munsch, although recent studies have explored the effectiveness and perception of Gen Z consumers in relation to digital marketing and advertising strategies, few studies have explored this in a South African context in light of digital fashion communication.

This study seeks to identify narrower characteristics of the Gen Z cohort, focusing on the socio-political factors affecting the fashion purchasing decisions of South African Gen Z consumers. Therefore, an understanding of the Gen Z cohort and the unique characteristics pertaining to Gen Z in Africa and South Africa is required. The study of Gen Z is a new research area with multiple gaps in the literature, as they are still an emerging and growing generation. There is extensive general research on the African consumer market (Melber 2022; Bucholz 2024; Njathi & Watkins 2024). In Africa, extensive research has been done to understand the African consumer in relation to

consumer behaviour, values, and consumer culture in Africa (Adeola et al 2021; Melber 2022; Muturi 2024; Njathi & Watkins 2024).

### **2.2.3 Gen Z Cohort in the South African Consumer Market**

Consumers have a considerable impact on the position and strength of a country's economy in relation to their spending power and the value it adds to the economy of a country (Remes et al 2021). The literature emphasises the role of consumers as the “economic agents” (de Jongh & Mncayi 2019:291) who generate income and distribute resources and how this has allowed for the accumulation of social capital and “integrated financial sectors” that permit the development of diverse and profitable economic markets (de Jongh & Mncayi 2019:291). As young emerging consumers in South Africa, Gen Z are reported to have a significant amount of spending power (Bucholz 2024).

The total youth spending in South Africa in 2019 amounted to R131.2 billion (McKinsey 2021). Of this number, the total youth spend for children under age 12 came to R38.7 billion of the overall total; teenagers spend R47.9 billion and young adults between the ages of 18 and 24 spend R44.6 billion (MediaUpdate 2019). It is important to note that the spending balance currently rests on the parents and young adults of the Gen Z cohort. These numbers highlight the substantial contribution the youth provide to the consumer market. Additionally, as this generation continues to contribute to the growing middle class in South Africa, their spending power will grow. Understanding the consumer's preferences, values, and beliefs is required to ensure that marketers are well-informed as Gen Z gains greater spending power. Globally, Gen Z is digitally transformed and virtually connected with the world through digital technology. However, understanding the societal influences that influence their buying and consumer behaviour is important.

In South Africa, Gen Z represents half (46%) of the population (Transunion 2020). It has also been reported that a few (15%) of the Gen Z population in South Africa represent South Africa's credit population (Pillay 2024; TransUnion 2024). Studies have begun to highlight the positive response that Gen Z has when applying for credit (Pillay 2024; Transunion 2024; Ventureburn 2020). Industries have begun to discuss the spending power of this generation, and as more are coming of legal age, their buying power is increasing (Bucholz 2024). Currently, research has shown that in South Africa, Gen Z mostly use their credit cards or accounts to purchase clothing (Ventureburn 2020). Two thirds (66%) of Gen Z spend on clothes using credit “8% in non-bank loans, 5% in bank

credit card and 4% in retail instalments” (Transunion 2020). Such high numbers of reports on the spending on clothing and fashion highlight the importance that the fashion industry pays attention to this growing consumer group and how they prefer to shop.

#### **2.2.4 Gen Z as Fashion Consumers**

As fashion consumers, Gen Z rely on social media for access to fashion product information. Gen Z surpasses all generational cohorts regarding social media usage (Poinski 2023; Siregar et al 2023). When it comes to gaining product interest and information, Gen Z relies on peer-endorsed product recommendations and reviews through social media platforms such as TikTok (Bendoni 2017; Poinski 2023). The use of social media for accessing fashion information has led to unique marketing approaches specifically for social media, which is called influencer marketing (Bendoni 2017). The circulation of social media enhances the distribution of information through personalised likes, comments, and chat functions (Bendoni 2017; Poinski 2023).

Social media processes merge news with storytelling, and the diversity of video stories creates a complex, interactive “communications nexus central to GenZ’s social media usage” (Siregar et al 2023:867). In addition, the digital media, including elements such as popular or viral music or sound clips and influence endorsements, further amplifies the holistic fashion shopping experience (Poinski 2023; Siregar et al 2023).

Gen Z relies on digital media to research or track current products in stores. Although Gen Z is comfortable doing their product research through social media and online, almost all (82%) of Gen Z prefer to shop in physical stores (Brill 2019; Portell & Kleinewillinghoefer 2019). Brill (2019:50) describes Gen Z as omnichannel, digitally oriented shoppers “who expect retailers and brands to offer seamless, enjoyable and personalised experiences”. An omnichannel marketing approach gears all interactions around the customer to ensure an integrated customer experience (Brill 2019). This is accomplished by offering integrated shopping channels, different options for buying a product and anticipating and removing potential hindrances to the purchase (Ungvarsky 2020). Within the continent, research done in Kenya investigating the impact of social media on fashion trends and consumer behaviour found that social media “democratises fashion by offering diverse content, shaping trends and consumer behaviour” (Muturi 2024:24). Although Muturi’s (2024) study does not highlight the consumer demographic identified, the findings do support well-established research claims of Gen Z consumers

reliance on social media and digital marketing communication (Bendoni 2017; Lay 2018; Faria, Cunha & Providênciab 2019; Winterhalter 2019; Nobile et al 2021).

The options or ways to shop currently available to consumers include brick-and-mortar stores or physical stores and online via phone, laptop, and social media (Mulyani, Aryanto & Chang 2019; Tunsakul 2020).

How an omnichannel marketing approach could be applied is explained using an example of a consumer shopping online. A consumer may begin to shop online by browsing the retailer's website and adding products to their virtual shopping cart but not proceeding to check out and buy the product (Ungvarsky 2020). If a consumer is logged in to their personal account of the retailer while shopping, they may still find the product in their 'recently viewed' items when accessing the site using another device or visiting the site a second time. Following an omnichannel approach, which is customer-centred, the retail company not only prioritises selling the product to the consumer but also removes any obstacles that might prohibit the consumer from deciding not to purchase the item after the initial viewing of the product (Fontanella 2020). This removal of obstacles can be achieved by reminding the customer about the product they did not check via sending an email and adding an incentive to purchase the item in their cart by placing an advertisement on the potential customers' social media feed, such as Facebook offering a discount on the recently viewed item (Ungvarsky 2020). Companies can track a consumer's online shopping journey through algorithmic technologies offering information about where the consumer stopped their shopping journey. Algorithms allow the retailer to implement customised marketing to lure the consumer into making a purchase (Ungvarsky 2020). Through an omnichannel approach to marketing, retail companies have several opportunities to communicate with their consumers using various effective marketing methods.

Gen Z in South Africa browse and search for fashion product information online via their smartphones, and they then proceed to shop online or at the physical store (Pillay 2020). Within the time the user browses a retailer's online platform, mainly through social media, and decides to purchase a fashion item, there are several opportunities to enhance the consumer's shopping experience (Radebe 2020). With Gen Z having advanced technological experience, it is important to identify whether current digital product communication methods successfully meet the requirements of the Gen Z user (Poinski

2023; Siregar et al 2023). Given this information, paying attention to the literature on the Gen Z cohort and understanding Gen Z as consumers is necessary. Given the aim of this study, it is also necessary to pay attention to the literature on marketing and fashion marketing communication.

## **2.3 MARKETING AND FASHION MARKETING**

This section unpacks the importance of marketing and the relevant marketing methods and processes. Subsequently, a discussion focusing on fashion marketing and the relevant fashion marketing approaches is unpacked. Marketing and fashion marketing research are argued to be key components to ensuring the success of effectively communicating products and services to consumers.

### **2.3.1 Marketing**

Marketing is an important part of the retail cycle as it allows businesses the opportunity to strategise and develop their brand identity to attract potential customers and gain customer loyalty through consistent product or service communication and promotion activities that meet customer demand (Cant 2020). Marketing can be understood to be a total system of business activities designed to plan, price, promote, and distribute goods and services to the benefit of current and potential customers (Babu & Arunaj 2019). Cant (2020) defines marketing as the process of planning and executing the conception, price, promotion, and distribution of goods and services to create valuable exchanges that satisfy individual and organisational goals. Marketing is required to anticipate the customer's needs through extensive marketing research. Furthermore, these identified customer needs must be met and satisfied. A key indication of the success of marketing is whether the marketing iteration has created a mutually beneficial and profitable exchange process where consumer needs are realised and satisfied. Successful marketing iterations will also be met if companies have competitively gained both sales and the loyalty of their consumers. A key term in the marketing process is exchange, which refers to the act of giving something to gain something else in return (Cant 2020).

For this give-and-take exchange in marketing to take place, five conditions must be observed and realised. The first condition is that at least two parties must be a part of the exchange process (Cant 2014). The second condition is that each party must possess something of value that the other party wishes to possess. The third condition, which is

two-fold, requires each party to communicate with the other party and deliver the goods and services to the respective parties concerned (Cant 2014). The fourth condition is the choice that each party could reject the other's offer. Lastly, the fifth condition is that the willingness must be there to deal with or exchange things with each other (Cant 2014). These five conditions, if prevailing, would imply that a potential market exists, and that exchange may now take place. In order to ensure the exchange takes place, it is important to understand the difference between production and consumption.

Within the marketing process, when assessing opportunities and identifying the gaps between product and consumption, it is important to consider that "the place where a product is produced is not necessarily where it is consumed" (Cant 2020:4). Consequently, this causes gaps in the marketing process. The identification of these gaps is referred to as core marketing aspects or the marketing mix.

#### 2.3.1.1 Marketing's 4Ps

The core marketing aspects are related to price, product, promotion, and place, commonly referred to as the 4Ps of marketing (Anjana & Sreeya 2019). Product refers to any item intended to satisfy the targeted consumer's needs and wants (Manthei 2017). A product can either be tangible goods, such as clothing, or a intangible service, such as teaching, legal services or a mobile phone application (Manthei 2017). Within the conceptualising phase of a product, marketers are required to have a clear idea of what the product stands for and what sets this product apart from the competition. Conceptualisation must be realised before the product can be marketed successfully. Price refers to the determination of goods' or services' value among the targeted audience (Donlan 2023). When pricing a product, companies formulate a pricing strategy that consists of calculations and relevant market data to ensure a balance between pricing that is not too high or too low, additionally, with the understanding that skewing the price and value of the product, either way, may jeopardise consumer perception of the brand (Donlan 2023). Place refers to where the consumer can access the product, and it is key for marketers to identify a place that offers the consumer the most convenience. This place of convenience may be a physical location or online through e-commerce systems. Identifying the right place, be it through digital means or otherwise, is about putting the right product in the right place, at the right price, in front of the customer (Cant 2020; Donlan 2023). The final P is promotion, which refers to all instances

made to make the targeted consumer aware of the product through marketing communication tools. Marketing communication tools are used to promote, persuade, inform, and remind customers and potential customers about products on the market (Kuczamer-Kłopotowska & Aycı 2019). These promotional instances include some of the following: public relations, direct marketing, television advertising, internet pop-up advertisements, email marketing, social media posting, and visual merchandising in stores (Keshari & Jain 2016).

With an understanding of marketing, its definition, and the core aspects that make up the marketing process, an understanding of the uniquely formulated marketing process of fashion products can be introduced and explored. The fashion industry contributes to the wider social and cultural phenomenon referred to as the 'fashion system', which is a concept that encompasses the business of fashion as well as the art, design, production, and consumption of fashion (Mitterfellner 2019). Fashion is used to communicate what is attractive in terms of appearance (Wolbers 2009). The fashion industry and fashion marketing thrive on this phenomenon (Wolbers 2009). Since the communication of appearance allows a person to illustrate with fashion how we want others to perceive us, one can argue that fashion marketing methods that enable such communication play an essential role.

### **2.3.2 Fashion Marketing**

Fashion marketing is defined as the application of various methods and a business philosophy that is centred on the consumers and the potential consumers "of clothing and clothing-related products and services" (Babu & Arunaj 2019). The aim of fashion marketing is to achieve the long-term goal of the organisation in relation to sales (Babu & Arunaj 2019). The fashion market is a diverse and categorised market. The categorisation of the fashion market is dependent on what a specific fashion company's focus pertains to. Categorisations that are most commonly referred to in the fashion market include the product sectors of clothing or accessories (Posner 2015). Geographic categorisations also exist where geographic sectors such as Europe, Africa, and South America are identified. Categorisations are also determined by the market level, which includes haute couture and ready-to-wear (Posner 2015). The term haute couture is a French term which is directly translated as high dressmaking (Business of Fashion 2021). The term refers to high-fashion designing, consisting of garments created as once-off

custom pieces. Fashion designers are selected and awarded the title of haute couture by the Chambre Syndicale de la Haute Couture after meeting specific requirements (Business of Fashion 2021). Some official members of the Chambre Syndicale de la Haute Couture include Chanel, Dior, and Givenchy (Business of Fashion 2021).

On the opposite end of the fashion market level spectrum is ready-to-wear fashion. Ready-to-wear fashion, derived from the term prêt-à-porter in French, refers to mass-manufactured clothing items available in standardised sizes such as size small or size 34 (Aakko 2018). The key difference between the two market levels is that ready-to-wear fashion is sold in a finished condition with lower cost implications due to the nature of mass production. Haute couture is sewn for one particular person with the highest quality of artisanship, which places the value of such garments on the high-end (Aakko 2018).

The final categorisation is determined by functions, such as formal wear, sportswear, and casualwear (Posner 2015). In relation to categorisation by function, fashion companies further section these into specific genders and age categories, such as womenswear and childrenswear. Table 2.1 presents the fashion market sectors according to product, gender, age, and function.

**Table 2.1 Fashion Market Sectors (Posner 2015)**

<b>FASHION MARKET SECTORS</b>	
<b>CLOTHING &amp; APPAREL</b>	
Womenswear: Evening wear Formal work and office Wedding and occasion Contemporary fashion Casual wear Denim Resort or cruise Sportswear Lingerie	Menswear: Bespoke tailoring Formal work and office Wedding and occasion Contemporary fashion Casual wear Denim Resort or cruise Sportswear
Childrenswear: Baby Toddler Boys Girls	

According to Posner (2015) the information related to fashion products is segmented in this way to ensure that companies can efficiently analyse market data and effectively observe business results. The global apparel market's total revenue generated in 2020 amounted to USD 1.46 trillion (Shahbandeh 2021). Characterised by its fast-moving and constantly changing pace or nature, the fashion industry is one of few that require companies to constantly be evolving and quick to respond to market change (Posner 2015). The nature of the fashion industry thus requires fashion marketers to constantly be aware of consumer demand and to identify successful avenues of communication with consumers (Miller et al 2009; Mitterfellner 2019).

Fashion marketing provides the consumer with relevant product information before making a purchase decision (Easey 2009; Posner 2015; Babu & Arunaj 2019; Mitterfellner 2019). How a product is communicated to a consumer has the potential to influence behaviours such as loyalty to a brand. The effectiveness of the marketing message in relation to the core marketing aspects communicated depends upon a number of factors, such as presentation style, attractiveness of the endorsers, and creative appeal (Keshari & Jain 2016).

### **2.3.3 Marketing Communication and Fashion Marketing Communication**

The traditional forms of marketing communication include advertising, personal selling, and publicity (Kuczamer-Kłopotowska & Aycı 2019). Marketing communications are also referred to as promotion and are defined as the coordination of promotional messages and related media for communicating with a targeted market (Kuczamer-Kłopotowska & Aycı 2019). Literature portrays the fashion landscape before social media, when consumers were only made aware of fashion information through controlled marketing and publicity created exclusively by the fashion industry (Bendoni 2017). The methods of marketing communication used previously also resulted in consumers adopting fashion trends at a controlled and measured pace. New communication media play a key role in shaping promotional activities in the digital age and promoting consumers' awareness and engagement throughout the fashion system (Bendoni 2017). The classification of media comprises three categories, which are: mass media, personal media, and electronic interactive media (Miller et al 2009; Posner 2015; Mitterfellner 2019).

The marketing industry is entering the digital era, where appropriate product communication methods are implemented according to consumer preference and

demand (Roberts 2016). The current commercial marketing communication methods include television advertising, internet pop-up advertisements, social media posts and visual merchandising in stores (Bendoni 2017). These marketing communication methods are also utilised in marketing fashion products and services. The various methods of marketing communication will be discussed in relation to Gen Z consumers and their key characteristics.

### **2.3.4 Mass Media Marketing Communication**

One of the earliest forms of marketing communication was done through print newspapers and catalogues (Bendoni 2017; Nobile et al 2021). This method of marketing falls under mass media marketing communication. Mass media marketing is a form of marketing communication that reaches a broad audience from many market segments. This type of mass communication targets a wider audience and is not specific to an individual market segment (Mitterfellner 2019). Examples of mass media marketing communication that will be discussed further in this section are fashion magazines and television advertisements.

#### **2.3.4.1 Fashion Print Magazines**

As a result of the industrial revolution that took place from the end of the eighteenth century to the mid-nineteenth century, the mechanisation of most goods was introduced, which, for the first time, saw the replacement of human labour with machines (Mitterfellner 2019). This shift or advancement in production increased the supply of goods, but an imbalance was identified when it came to the demand for these mass-produced goods. Manufacturers had to find ways to gain the customer's attention and secure a sale (Mitterfellner 2019). As a result of industrialisation and rapid production of goods, the branding and advertising industry was realised (Posner 2015). Mass media marketing communication through newspaper sales was introduced to reach more customers through mass communication to increase sales. Various print media formats were developed, such as posters, billboards, magazines, and newspapers (Mitterfellner 2019). By the mid-nineteenth century, fashion magazines originating from France were internationally sourced in Italy, Britain, and Germany. Magazines such as Harper's Bazaar and Vogue were founded during the mid to late eighteenth and nineteenth century and can still currently be purchased (Mitterfellner 2019).

In the past decade, print magazine sales have declined (Watson 2021). The rise in the adoption of digital technology and accessing digital media resulted in fashion magazines evolving into digital multi-platform businesses. Fashion magazines are now digitally accessible via smartphone or tablet devices. Although magazine companies have evolved, there is still a significant decline in this mass media marketing communication method (Conti 2021). Magazines are still finding relevant ways to monetise online and offline fashion communication to gain Millennial and Gen Z users or subscribers. Websites which apply a buy-now-and-pay-later method or approach are examples of the evolved magazines in this digital age (Conti 2021:8). Conti (2021:8) explains how “these sites offer slick imagery, campaigns and marketing content, hire celebrity ambassadors and actively engage with consumers, giving them the opportunity to curate searches and wish lists, discover new brands, track the trends and spread their payments, interest-free, across weeks or months”. Where traditional magazines would be published monthly for consumer purchases, digital magazine sites offer their consumers a customised payment subscription option (Conti 2021). Some of these retail websites include Alibaba, Net-a-porter, Farfetch, and Matches Fashion. The key objective is to offer the targeted Millennial and Gen Z consumers fashion communication in the form of curated product media, such as video streaming, as well as the option to shop all in one place (Conti 2021).

#### 2.3.4.2 Television Advertising

Television (TV) advertisements as a mass media marketing communication method are considered to be one of the more costly advertising tools, and it has also been noted that TV may not guarantee to reach the targeted consumer (Kuczamer-Kłopotowska & Aycı 2019). TV advertisements are effective in creating brand consciousness among consumers (Posner 2015). TV advertisements project company messages through visuals, motion, and sound to ensure instant relevance and prominence to the advertised products and services on TV (Kuczamer-Kłopotowska & Aycı 2019).

In the digital age, TV formats and viewership have evolved as consumers are now able to watch TV shows on smartphones or tablets through online streaming subscription services such as Netflix, Amazon Prime (Perry 2021), and Showmax (Kwach 2020). A streaming service is defined as an online entertainment provider of content such as TV shows, films, and music. The entertainment content is delivered digitally via an internet connection to the subscriber’s smart device (PCMag 2021). With streaming services,

subscribers can enjoy watching TV shows or films without the inclusion and interruption of advertisements as the streaming is advertisement-free (Perry 2021). This new format of watching TV may reduce the level of engagement with marketing communication through TV advertisements.

In relation to Gen Z and their preference for digital media, TV advertising may not be an appropriate marketing communication method due to the lack of relatability of the communication format. Reports have shared results through a comparative analysis of media and entertainment consumption between the Baby Boomer generation and Generations X, Y, and Z. Amongst Gen Z, “playing video games was their favourite activity by 26%, followed by listening to music contributing 14%, browsing the internet by 12%, and engaging on social platforms by 11%. Only 10% of Gen Z said that watching TV or films at home was their favourite form of entertainment” (Deloitte Insights 2021:5). As discussed in previous sections, Gen Z have a preference for instant, interactive, short spans of communication heavily rooted in visual media. It is important that marketing communication targeted to Gen Z is relevant and relatable to them. Razzaque (2016) highlights that the Gen Z cohort communicates through visual symbols and acronyms more than they do through text. Some of these visual symbols include the sharing of images or short videos (Razzaque 2016).

Marketers and advertisers should evaluate the perception of digital screens and the shift in preference for portable smart devices. The hierarchal system applied to the value of various screens has changed due to the influence of the digital era. This shift also impacts the level of impact television advertisements have in a digital space and among a digitally oriented generation such as Gen Z.

### **2.3.5 Visual Merchandising in Physical Stores and Online Browsing of Fashion Information on Digital Devices**

Visual merchandising as a fashion marketing communication method exists within the retail environment. Visual merchandising refers to “the physical representation and communication of the brand or retailer, through creative grouping and presentation of merchandise in windows and in the store” (Easey 2009). Creative design and styling according to fashion trends are used to entice the consumer and capture their attention through window displays. Visual merchandising contributes to communicating products currently being promoted as well as communicating a fashion retailer’s brand image and

identity through creative design and the development of an aesthetic synonymous with the retailers' brand identity (Easey 2009; Bendoni 2017).

Visual merchandising is considered an important aspect of the store layout, as its objective is to attract potential customers to enter the store. The window displays of fashion products styled according to relevant fashion trends are aimed at communicating visual messages to consumers who walk past the display. Within the digital age, visual merchandising still plays an important role, and retailers have been reported to adopt this method of marketing by incorporating digital technology (Miller et al 2009; Woodside & Ko 2013; Posner 2015; Brill 2019).

Although the Gen Z cohort is described as digitally astute, visual merchandising as a traditional form of communicating product information and advertising is still relevant in today's digital age (Brill 2019). Retailers have incorporated a virtual window-shopping experience for consumers. Virtual window shopping refers to online browsing for product information and the availability of retailers' websites, mobile applications, or social media sites (Rooke 2014). Consumers are making use of this virtual method to assist with their purchasing decisions.

Previous research in fashion marketing communication has established that the physical store retail experience depends very much on hedonic interactions (Hurvitz 2022). Studies have been done in reference to the expected requirements related to creating a dual shopping experience where digital technology is integrated with physical shopping (Parker & Wang 2016:488). Studies such as these become more important as societies and technology shift more towards a digital presence. There are still relevant benefits related to the physical interaction with fashion products, and digital integration can be seen as an improvement which aligns with the demands of a digitally oriented consumer (Parker & Wang 2016:488).

In 2011, eBay developed a retail campaign combining the traditional marketing method of window shopping with digital technologies, offering consumers the opportunity to shop the window display through their smartphones. (Bendon 2017). The window display consisted of the traditional storefront mannequins dressed and styled in various fashion

products, as well as brief product descriptions and QR<sup>2</sup> codes for the respective products on the window display. The QR code stores information in the form of pixels in a square grid. QR codes are used to track product information and are often used for marketing and advertising campaigns. This digitally integrated form of shopping removes the reported consumer frustrations related to the traditional shopping experience, such as waiting in long queues (Business Wire 2011).

In more recent times, retailers have had to adapt to the implications that the COVID-19 pandemic has had on the traditional practices of retail and customer interaction and engagement with fashion products and access to these products. The fashion retailer Très Bien, based in Sweden, has introduced virtual window shopping via Zoom. Zoom is a virtual video call and chat service application (Yotka 2020). The company has created a virtual version of its store, and it uses Zoom to consult with customers and view products. The virtual store can be accessed through the Très Bien website and is only operational during the store's trading hours (Yotka 2020).

### **2.3.6 Fashion Marketing Communication in the Digital Era**

The digital era calls for industries to streamline or digitise their product or service offerings digitally. Digitisation promotes the integration of the various retail channels utilised to sell goods. Digitisation is defined as the technological change that enables new ways of doing things, often digitising traditional manual processes to promote efficiency and keep up to date with technological advancements (Kemppainen 2017). Digitisation brings down the walls sustained by manual and traditional processes, and the chain becomes a completely integrated ecosystem that is fully transparent to all the players involved – from the suppliers of raw materials, components, and parts to the transporters of those supplies and finished goods, and finally to the customers demanding fulfilment (Schrauf & Bertram 2016).

Digitisation requires industries to step out of working in silos and consider all aspects that pertain to a product or service at the brainstorming phase, meaning that stakeholders with contributions to make towards the development of the product or service should be

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<sup>2</sup> A QR code is a Quick Response code and is defined as a type of barcode that is scanned using a smart device such as a smartphone (Hayes 2020).

included and engaged (Brydges, Hracs & Lavanga 2018; Ndung'u & Signé 2020). Furthermore, inclusion and engagement will ensure that product or service offerings are relevant and meet the needs of the consumer.

The digital era has also transformed how fashion product information is communicated to consumers (Bendoni 2017; Muturi 2024). New levels of experience and service are being realised and set into practice in the fashion industry. Due to technological advancements, businesses or companies in the fashion industry, from high-end luxury to discount retail brands, are moving away from being a product-centred brand to becoming one that shapes and implements contextualised, consumer-centric propositions – a brand that considers its entire experience eco-system (Lay 2018). This shift has resulted in traditional businesses still operating on analogue systems and processes to be mediated by these new standards, and some companies may find themselves obsolete and outdated in comparison (Lay 2018).

Lay (2018) describes fashion as one of the most challenging fields, significantly impacted by global economic uncertainty, evolving trends, and industrial revolutions. In response to the need for growth and cost efficiency, many brands have launched a series of initiatives to accelerate market responsiveness that integrates sustainable innovation in the core product design and manufacturing and supply chain processes (Amed et al 2020; Baena 2024). The current times are characterised by digital communication and consumption that has transformed societies into network communities where virtual societies are formed, which has produced new consumer behaviour and the need for a reinvention in sales (Andò et al 2019). This networked community implies that information is easily accessible to consumers, resulting in marketers and companies having well-informed and sophisticated consumers (Duffett 2017; Mulyani, Aryanto & Chang 2019; Pavlič & Vukić 2019; Lee, Rothenberg & Xu 2020).

Research related to the African marketing landscape begins to explore technology adoption. The article titled *The Potential and Challenges of Artificial Technology (AI) Adoption in Marketing Across Africa* examines how artificial intelligence is reshaping marketing across the continent, with South Africa identified as one of the leading adopters alongside Nigeria and Kenya. The article highlights the potential for AI to transform fashion marketing through personalised consumer engagement, predictive analytics, automation, mobile-first strategies, and hyper-local content. Currently, in the South

African fashion sector, personalisation is present in basic forms such as product recommendations on platforms like Woolworths and Superbalist. However, a more customised and localised consumer experience that reflects the country's cultural, linguistic, and regional diversity is not yet developed. Predictive analytics, which could be used to anticipate micro-trends or manage seasonal stock with greater precision, remains underdeveloped (Sadiku & Olaoluwa 2024).

Mobile-first optimisation is well established, reflecting South Africa's high mobile penetration, yet AI-driven mobile innovations—such as augmented or virtual reality changing rooms or try-ons are still rare and not well researched in current literature (Jo & Jin 2024). Engagement localisation also lags, with many major fashion brands favouring generic nationwide campaigns rather than tailoring messaging to specific regions or communities. The article points to several barriers slowing adoption, including a shortage of AI talent in the retail sector, high costs associated with imported technology, uneven internet infrastructure in certain regions, and regulatory complexities under South Africa's Protection of Personal Information Act (POPIA), which can make large-scale personalised marketing more challenging (Sadiku & Olaoluwa 2024). There is also a degree of consumer wariness around data use, which could limit acceptance of hyper-personalised approaches (Sadiku & Olaoluwa 2024).

## **2.4 WEB 2.0 AND THE DEVELOPMENT OF SOCIAL NETWORKS AND SOCIAL MEDIA PLATFORMS**

Winterhalter (2019:283) studied the traditional web hierarchies in relation to consumers consuming product information, which influences their purchasing decision, and found the web hierarchies transforming “into a network of horizontally connected people who decide their consumption”. The way business is carried out usually employs a hierarchal system known to yield skills and efficiencies for maximum effect and success. This hierarchal system is usually applied where the more experienced or trained workers migrate to the top of the pyramid to assert the position of managing a larger group of workers under them, all assigned different tasks (Winterhalter 2019). However, the internet follows a different system, usually a star or tree topology (Parvin 2019; Winterhalter 2019; Vasan 2023).

The traditional network of web hierarchies is an information technology (IT) system that depicts how the internet works by employing an interconnected topological system to create an integrated mesh framework (Parvin 2019). Winterhalter (2019) mentions this web hierarchy as a descriptive similarity to explain this transformed consumer in the digital age and how marketing and fashion communication is required to adapt their product or service communication strategy to more effectively align with their consumer.

Fashion communication is fundamentally aimed at communicating product and service information. The history of fashion marketing includes various strategies and approaches to communicating product and service information to produce sales (Nobile et al 2021). The fashion industry is synonymous with constant changes in products and services, which are influenced by trends forecasted by industry professionals, media and brand awareness of products, and consumer feedback (Bendoni 2017; Nobile et al 2021). All of these influences can be identified as methods of successfully producing customer awareness and product sales.

#### **2.4.1 Social Media**

Studies have begun to explore social media's impact on the marketing of fashion products. The rise of social media has brought about new professional skill sets born out of the trust and interaction formed through these virtual communities, such as social media content creation (Bendoni 2017). Social media can be defined as electronic communication in the form of either a website or application for social networking where users form online communities and share ideas and information in the form of various media such as images, videos or text (Merriam-Webster 2021). The terms social media and social networks are known to be used interchangeably (Burns 2017). Social media refers to sites that allow users to create and share content as well as connect with other users. The term social networks refers to the communities formed by users on social media sites. In earlier years, social media platforms were commonly referred to as social network sites, and many of these platforms emphasised the networking aspect of the platform (Burns 2017).

The concept of sharing messages between users through a bounded online system dates back to 1978 when the first message was shared or sent between users using the Bulletin Board System (BBS) (Burns 2017). The BBS was introduced to users when the first home computers came onto the market. BBS messaging would allow its users to “share

messages through a computer network [...] where users could dial into a host computer, which would establish a connection via modem” (Burns 2017:8). In the 1990s, online network platforms welcomed more advancements around the sharing of online conversations and messaging through more online based platform inventions or creations such as Usenet. Usenet allows for online conversations between users where individuals can post or reply to comments (Burns 2017).

In 2003, Myspace, one of the first social media platforms that incorporated more than online networking, was founded. Myspace was created as an online social platform for musicians to share content and interact with fans (Burns 2017). Users of Myspace could create a personal profile with the option of customising their profile layout, adding their favourite song to their profile, and posting videos, blog posts and photos (Garbutt 2020). Myspace has a very similar platform model to the current popularly used social media platforms, such as Facebook, Instagram, and TikTok. Users can interact with their friends or followers and generate and upload their own content to share on the platforms using various media formats. Literature has reported on how the user-generated content (UGC) created by users of social media is regarded as the “lifeblood” of a social media application (Obar & Wildman 2015:7). UGC is defined as media content curated or generated by the public or consumers and distributed on the internet (Nagy & Koles 2016).

A study by Sokolova and Kefi (2019) investigated the link between the parasocial interactions between social media beauty and fashion influencers and their followers. The study aimed to enhance the comprehension of the “persuasion cues” (Sokolova & Kefi 2019:3) in relation to social media influencers and their followers. Furthermore, the study aimed to identify how such interactions contribute to the products and service purchase intentions showcased on the selected influencers’ social media platforms (Sokolova & Kefi 2019). The term parasocial refers to a relationship between spectators, or in the case of social media, the user or follower, and the performer or social media influencer (Sokolova & Kefi 2019). A key characteristic of parasocial interactions is that the relationship is “self-established” (Sokolova & Kefi 2019:3). Usually established by the spectator or viewer, the performer is usually unaware of the relationship or the influence or persuasion power they hold. Gen Z and their use of social media significantly impact how they spend their time daily. Gen Z has been reported to spend a minimum of 2 hours and 58 minutes to a maximum of 4 hours on social media (Mander, Buckle & Morris 2020;

Skiera 2024). The most popular social media platform the global Gen Z cohort uses is YouTube, followed by TikTok and Instagram (Dixon 2024).

#### **2.4.2 Digital Fashion Communication and Media**

Through social media, Gen Z consistently and actively participate and interact on these online platforms, which contributes to cultural changes brought about by the advancement in digital technology (Bendoni 2017). Cultural changes increase the daily consumption and engagement with information (Bendoni 2017). This cultural shift also impacts the constant change in the fashion cycle. The fashion cycle refers to the cycle or process in which a new fashion trend is introduced, gains mainstream traction with consumers, declines, and subsequently is rejected once the obsolescence stage is reached (MasterClass 2021). Due to technological advancements and their subsequent impact on the rapid changes in the fashion cycle, Gen Z is not accustomed to waiting for fashion information in the form of monthly subscription magazines, as was the case for previous generations, such as the Millennial and Generation X cohorts.

As fashion consumers, Gen Z rely on social media for access to fashion product information. When it comes to gaining product interest and information, Gen Z relies on peer-endorsed product recommendations and reviews (Bendoni 2017; Poiniski 2023; Siregar et al 2023). The use of social media for accessing fashion information has led to a new form of marketing referred to as influencer marketing (Bendoni 2017). Studies have identified how Gen Z relies on digital media to research or track current products in stores. Although Gen Z is comfortable doing its initial product research through social media and online, most (82%) of Gen Z prefer to shop in physical stores (Brill 2019; Portell & Kleinewillinghoefer 2019). As discussed in section 2.2.4, Gen Z has been described as omnichannel shoppers who require a digitally streamlined and integrated shopping experience. This streamlining may be accomplished by offering integrated shopping channels, different options for buying a product and anticipating and removing potential hindrances to the purchase being made (Ungvarsky 2020).

### **2.5 SUMMARY**

This chapter explored the key concepts pertaining to the study and exploration of digital marketing strategies targeted at Gen Z fashion consumers. The literature pertaining to generational cohorts and the generational theory and its premise was introduced in

relation to the Gen Z cohort. The study of Gen Z is still considered a new area of research as the majority of this cohort is in the phase of adolescence to enter the labour market. Studies have begun to explore consumer-related traits or characteristics of Gen Z. Although research can be found around the general African consumer market, little research can be found around an understanding of the Gen Z South African fashion consumers and their preferences for digital fashion communication. Literature has identified the growing spending power that Gen Z possesses, and as they get older, they will have more influence on the consumer market and contribute to the ever-increasing middle class in South Africa and the continent. This growth forecast highlights the importance of better understanding Gen Z consumers and possibly developing marketing strategies that appeal to consumer requirements.

Researching the targeted market would be required to develop and propose a suitable marketing strategy. The introduction of marketing as a crucial concept in this chapter provided a definition of the core concepts of the marketing mix. It enabled this research to apply the core concepts to the context of this study. Fashion marketing has its unique processes and methods created to market fashion-related products, such as clothing, jewellery, and shoes, and with the advancements in the digital era, the industry, like many others, has seen a change in approach when it comes to communicating fashion products through digital platforms or channels.

Section 2.2 of Chapter 2 reviewed some of the traditional fashion marketing methods in relation to Gen Z, how these methods have evolved in the digital age, and how Gen Z interacts with these methods. The discussion of consumer preferences also allowed for the discussion of how the internet and social media have streamlined marketing methods into an omnichannel marketing approach where companies have multiple opportunities to sell their product to the consumer.

## CHAPTER THREE: THEORETICAL FRAMEWORK

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The literature review discussed in Chapter 2 further contextualised the premise and the relevance of this study, which seeks to explore the fashion consumer behaviour of the South African Gen Z cohort. Additionally, the study aims to identify the socio-political influences on their purchasing behaviour and preferences as fashion consumers. As a result of this exploration, the study aims to identify and develop differentiated opportunities for marketing and interacting with Gen Z through digital interfaces, platforms, and devices related to fashion.

Subsequent to the literature review and in-depth establishment of this study's argument, Chapter 3 will look at critical theories related to the study by defining them and then positioning the study's objectives. The empathic design approach, as well as the digital affect and the digital marketing strategy frameworks are defined and contextualised according to their applicability in this study. Before giving an in-depth analysis of these key frameworks and how they are applied, the concept of hedonics and a consumer-centred marketing approach is discussed. Subsequently, the integration of the three frameworks through the development of a model titled the digital marketing effectiveness framework (DMEF) highlights the broad and competitive sector that fashion encompasses. Furthermore, optimising how products and services are communicated and sold to consumers in the digital space requires strategies that support the unique requirements of such an industry marked by constant change.

### 3.1 HEDONICS OF DIGITAL FASHION CONSUMERS

In section 2.3.5, the literature review introduces the term hedonic, which is related to fashion marketing communication tools to entice product and service information to targeted consumers. Research exploring consumers' hedonic experiences in physical stores is available. However, with shopping now having advanced into the digital age, the user or consumer experience has subsequently changed (Wrigley & Straker 2019). In addition, the advancements of the digital age have also resulted in a digitally astute and informed consumer as information on the internet is more accessible. Therefore, enquiring or exploring consumer experiences through digital channels is relevant and necessary.

As this chapter seeks to ground the research investigation in theory, relevant theories and approaches are presented. One such theory that aligns to the study is the Innovative Engagement Theory. The Innovative Engagement Theory, developed by Yoesoep Edhie Rachmad and presented in his 2023 publication *Kolkata Howrah Pustak Prakashan, Vishesh Sanskaran*, examines how creativity and innovation in communication and interaction strategies can enhance engagement and participation, particularly in digital environments (Rachmad 2023). The theory emerged from the recognition that traditional engagement methods are increasingly less effective in a competitive and fast-paced digital landscape. Observing that platforms and creators who embrace innovative approaches tend to achieve greater interaction, satisfaction, and loyalty, Rachmad (2023) sought to identify the elements that make such strategies successful. The theory defines the term innovative engagement as the application of novel and creative tactics that leverage advances in technology and insights from psychology to not only capture attention but also foster active participation and meaningful connections with content (Rachmad 2023).

Rachmad (2023) concludes that innovative engagement is essential for remaining relevant in modern digital media, where audiences demand both value and enhanced user experiences. The theory emphasises continuous experimentation with emerging techniques such as interactive content, augmented reality, and personalised experiences, alongside the integration of user feedback to refine strategies in response to evolving preferences and behaviours. These approaches, according to the theory, can generate deeper consumer insights, increase brand loyalty, and improve overall satisfaction. The Innovative Engagement Theory provides a relevant framework that underpins this study. Furthermore, supporting the investigation of how companies can evaluate the level of effectiveness of digital fashion communication that centres on consumer values and preferences to enhance brand loyalty.

Wrigley and Straker (2019:4) reference digital technology and how it has disrupted the traditional communication model for companies. Conventional one-sided, company-dominated communication has evolved to a two-way interaction, creating a power shift between businesses and customers, leaving the customer largely in control (Wrigley & Straker 2019:4). This is known as a customer-centric approach to product and service communication in marketing.

### **3.2 PRODUCT-CENTRIC APPROACH AND A CONSUMER-CENTRIC APPROACH TO MARKETING**

A product-centric method is used when designers and marketers focus on product development and all the aspects relating to the final product and making as many sales as possible (Kotler & Kartajaya 2017; Study.com 2016). As a result, challenges may arise when designers and marketers apply a product-centric approach that does not carefully consider the interaction and experience of the consumer using the product (Straker & Wrigley 2016). Product-centric marketing can be seen mainly in the fashion industry when brand product campaigns market a product and entice the consumer with aspirational branding. This marketing method aims to make the product desirable by targeting consumers' emotions and attitudes for them to identify with and assimilate to the product and its associated social status (Saviolo & Marazza 2013). More consideration is placed on the product and brand than on the targeted consumer. Aspirational marketing has proven successful in fashion, especially with fashion brands such as Diesel, Nike, and Ralph Lauren (Saviolo & Marazza 2013).

Straker and Wrigley (2016) suggest that the digital age has brought a new attitude to business strategies that centre the consumers' needs to deliver and create value. As digital technology becomes more intertwined with everyday activities, a shift in marketing and brand communication is also evident in recent years. Kotler, Kartajaya and Setiawan (2010) state that marketing is no longer as simple as creating a product and brand identity and determining product value on behalf of the consumer. Today's consumers are well-informed and can make comparisons of similar product offerings (Kotler et al. 2010). The consumer defines the value of a product. The shift in marketing approaches has moved away from a product-centric to a consumer-centric approach when creating and marketing products.

Wrigley and Straker (2019) highlight the significance of consumer-centric design in creating products or services and marketing that produces or services information. This emphasis is because the interpretation of marketers may not meet consumer preferences, alluding to the notion that the targeted consumers may not receive successful product communication tools from a marketer's perspective in the

marketplace. This indicates that there could be a gap between designers' and marketers' understanding of consumer preference.

For South African fashion brands and the current fashion industry, the research by Abdulraheem Mulikat, Imouokhome Ebum Omoniyi, and Tajudeen Alaburo Abdulsalam (2025) offer relevant and researched implications related to how specific digital marketing elements influence Gen Z purchasing patterns in Africa's rapidly evolving fashion industry, with direct relevance to South Africa's own Gen Z consumer market.

The article highlights that awareness and reach should be expanded through consistent, platform-specific campaigns, especially on Instagram and TikTok, which dominate Gen Z engagement. Interaction is critical and brands should use live streams, behind-the-scenes content, and interactive tools such as polls or virtual try-ons to create a sense of community. Persuasion and influence remain powerful, but require authenticity. The findings emphasise how brands that partner with influencers who genuinely reflect their values and aesthetics are more likely to mitigate the risk of consumer scepticism (Mulikat, Omoniyi & Abdulsalam 2025).

The study's recommendations are particularly relevant for South Africa, where major retailers and local designers alike face increasing competition from international e-commerce platforms such as Shein (Mulikat, Omoniyi & Abdulsalam 2025). Brands are encouraged to invest in engaging, high-quality content, leverage analytics for personalised recommendations, and adapt to Gen Z's platform preferences while maintaining transparent and culturally sensitive messaging. In essence, the findings confirm that in South Africa's fashion sector, as across Africa, digital marketing, when authentically executed and tailored to Gen Z's unique consumer preferences and values, can significantly enhance brand loyalty, engagement, and sales (Mulikat, Omoniyi & Abdulsalam 2025).

### **3.3 EMPATHIC DESIGN APPROACH**

The empathic design approach is a multidisciplinary design approach that offers designers and researchers the required framework for developing a creative understanding of consumers' experiences and opinions (Postma et al 2012). Empathic

design is grounded in the concept of practising empathy and is also described as a nuanced phenomenon that influences one's cognitive process about another individual's experiences and opinions (Luh et al. 2012). In addition, empathy and its effects on individuals' cognition emphasise and offer insight into an individual's emotional and experiential components as a consumer (Batson 2009). Empathic design is rooted in design practice and branches off from human-centred design (HCD), an approach to design that centres on the needs and preferences of the end-user through co-design and collaboration. The empathic design approach applies similar methods used in ethnographic research, which "focuses on everyday life experiences", but in addition, explores the "desires, moods, and emotions in human activities, turning such experiences and emotions into inspiration" (Mattelmäki et al 2014:67).

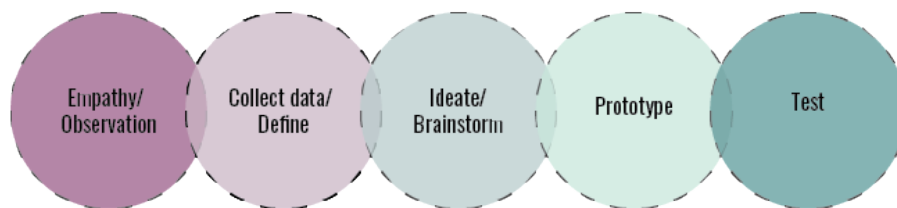
As a design research approach, the empathic design approach is usually applied during the early stages of new product development when product concepts are developed and potential product opportunities need to be identified and explored (Postma et al 2012). In the research context, the empathic design approach is applied to determine the preferences of Gen Z fashion consumers for digital fashion communication products and services. The approach posits the needs and preferences of Gen Z as a crucial element to the enquiry and identification of user-centric strategies for digital communication of fashion information.

Postma et al. (2012) outline and explain four principles of empathic design. The first principle is to balance rationality and emotions to understand users' experiences. In empathic design, the balance is established by "combining observations of what people do with interpretations of what people think" and feel (Postma et al. 2012:60). Previous research related to user cognition of products focused on how users understand and use products (the focus being on the product).

The first principle of empathic design establishes the importance of understanding users' feelings or emotions towards product usage as it offers insight into the user product experience. The second principle is making empathic inferences about the user or users to conceptualise possible relevant products. Empathic design requires designers and researchers to use empathic abilities to make interpretations of the tacit consumer insights related to how they think and feel in envisioning possible future opportunities for product use (Postma et al 2012). The third principle is to involve the user as a partner in

new product development. Users are perceived as the authorities of their experiences and thus become vital partners in establishing a creative understanding of these experiences. The fourth principle of empathic design recommends that designers and researchers work in partnership to conduct user research and designing to ensure that the user's perspective is included in new product development (Leonard & Rayport 1997; Postma et al. 2012).

The four principles of empathic design outlined by Postma et al (2012) are adapted from the five-step process of empathic design established by Leonard and Rayport (1997), which explains that most companies can apply the empathic design approach to business and marketing by employing a five-step process. In Step 1, observing the targeted consumers interacting with the potential product or idea occurs. Step 2 requires the researcher and designer to interpret the data and inferences expressed by the consumer to delineate the identified problem and start conceptualising possible solutions. In Step 3, the researcher and designer must analyse and reflect upon the data and insight gathered to begin product brainstorming (Luh et al 2012:233). In Step 4, product prototyping can occur after brainstorming ideas (Luh et al 2012:234). Step 5 involves the consumer's engagement and using the product to test and review (Leonard & Rayport 1997:108). Figure 3.1 presents the five-step process as an ongoing process where some steps may be applied in conjunction.



**Figure 3.1: Five-step process of empathic design (Leonard & Rayport 1997)**

Leonard and Rayport's (1997) five-step process of empathic design was designed for companies to apply when conceptualising or introducing new products to consumers from the perspective of product development and product communication. Postma et al. (2012) outlined four principles of empathic design applied from a design research perspective of new product development for users. Both explorations of product development for the consumer and user through the empathic design approach follow fundamental elements

of the process of application. However, the differentiation between consumer and user suggests different contexts of application. A consumer or customer defines a person or business that purchases goods or services from a company (Kenton 2021). Consumers are the key drivers of business revenue, and marketing activities develop specialised strategies to sell products and services in a competitive environment. A user may refer to a customer, cell phone owner, internal employee, or individual utilising a software application or website (Sauro & Lewis 2016). The term user is commonly used in design and computer design (Sauro & Lewis 2016). Within this study, the term consumer will refer to Gen Z as the element of marketing and digital communication that forms part of the study's primary objective in evaluating the digital fashion marketing strategies targeted to Gen Z consumers.

Straker and Wrigley (2016:279) present a new approach to fashion business and marketing strategies that have recently included the customer as a valuable stakeholder in creating and delivering value in products and services. This approach allows the industry to investigate, understand, and adapt its strategic business position in an evolving digitally connected environment (Straker & Wrigley 2016). Understanding Gen Z as emerging consumers who desire more involvement in the products and services they consume is important in establishing an effective marketing strategy.

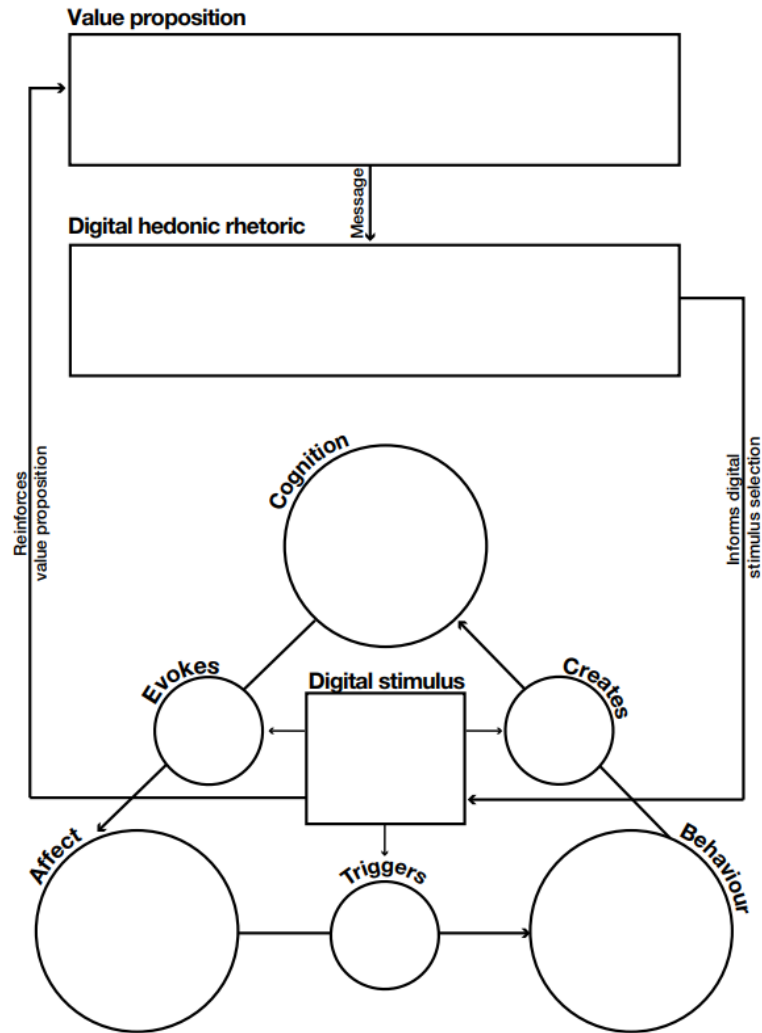
### **3.4 DIGITAL AFFECT FRAMEWORK**

Preceding sections in this chapter contextualised and discussed how consumers are now better informed and how the hedonic experience with a product in relation to the feelings related to that product can alter their engagement and behaviour toward a company or brand (Wrigley & Straker 2018). The digital affect framework is designed to explore and understand consumers' interaction with a product, service, or company within digital channels (Wrigley & Straker 2018). This framework is designed to guide and inform the creation of digital communication strategies that identify relevant digital channels of communication based on consumer insight and interaction. The digital affect framework demonstrates a direct relationship between cognition, emotion, and behaviour. Grounded in a human-centred design ethos, the framework follows an empathic approach to "understanding the emotional aspects of a customer-and-product or customer-and-company relationship" (Wrigley & Straker 2018:134). The digital affect framework is adapted from Damasio's (1994) somatic marker hypothesis theory, which emphasises

the importance of emotions in decision-making. Somatic is a term that refers to signals related to the body and brain that people experience as feelings and emotions (Denburg & Hedgcock 2015).

Affect is an over-arching term that refers to the themes of emotions, feelings, and moods. These three themes will be defined in relation to the digital affect framework. Feelings are personal or subjective representations of emotions. Some examples of feelings include feeling curious, regretful, worried, or threatened. Emotions result from a specific event or incident, including jealousy, rage, fear, love, and excitement. Lastly, a mood is a long-term affective state triggered by a combination of emotions (Wrigley & Straker 2019). One's mood commonly lasts a long and is not as intense as emotions. The crucial difference between an emotion and a mood is that people tend to be more aware of their mood and can readily express this. Moods include anxiety, irritability, disappointment, mellow, stress, cheerful or peaceful (Wrigley & Straker 2019).

The digital affect framework follows a process of designing digital channels of engagement intersecting with the fields of business strategy and digital technology. Figure 3.2 is a visual depiction of the digital affect framework and the applied process. The process includes the strong emotional responses to a digitally oriented stimulus and the consumer experience when engaging with the stimulus.



**Figure 3.2: Digital Affect Framework (Wrigley & Straker 2019)**

The first objective which needs to be established is the value proposition. A value proposition is part of a company’s marketing strategy and refers to the value a company guarantees or promises to provide customers if they opt to purchase their product (Twin 2020). Secondly, the digital hedonic rhetoric needs to be established or contextualised. Digital hedonic rhetoric refers to the anticipated affect (emotions, feelings and moods) and what we feel towards the value proposition. Hedonism refers to the act of pleasure or happiness that is experienced when doing certain things (Merriam-Webster 2021). Digital hedonic rhetoric requires companies to apply empathic inferences to understand the consumer “and how they interact in the digital world” and identify their daily habits and behaviours when engaging with digital media (Wrigley & Straker 2019:138). Understanding why consumers engage with digital communication media informs

companies on how to communicate and interact with the targeted consumer and develop a digital strategy based on the identified consumer behaviours (Poinski 2023).

The experienced digital hedonic rhetoric would be related to the emotions, feelings, and moods experienced due to the value proposition and the digital stimulus. The company creates perceptions of the company through the value proposition and the hedonic rhetoric using the digital stimulus with which consumers engage and interact. Essentially, the digital stimulus is digital media created by a company for the interaction and consumption of the consumer. Wrigley and Straker (2019:139,140) explain that:

The digital stimulus is more than just posting content on a channel; it is a way to communicate your company's value and provide memorable experiences. This should start with designing an experience you want your customer to have with your company. Once you identify your desired experience and emotions, this can help you select the proper channels or design a new one if they don't yet exist.

Considering the digital stimulus, Gen Z consumers are making marketers aware of how they would like to communicate with brands through their online media communication preferences. Their preferences highlight a need for authentic and relatable experiences that endorse or share a particular brand's message (Bendoni 2017). Gen Z approves of peer-endorsed or reviewed marketing communication (Tapinfluence 2015; Poinski 2023; Siregar et al 2023). This generation of digitally adept individuals is at the forefront of collaborating with marketers to deliver marketing communication that is valued by the consumer rather than marketers being the sole generators of content and consumers merely consuming the information available to them(Bendoni 2017).

The digital affect framework depicted in Figure 3.2 then explains the process following the interaction with the digital stimuli. Firstly, the cognition or thoughts related to the stimulus would be experienced by the consumer, which would evoke an affect. The evoked affect relates to the themes of emotions, feelings, and moods. The affect then triggers behaviour, which is explained as what the consumer does in response to the digital stimulus based on the affect experienced. The company or brand aims to establish consumer behaviour that benefits the brand by successfully creating digital communication that evokes positive effects. Based on the empathic design approach and the digital affect framework, this research finds value in both frameworks, as they offer

crucial elements in establishing the research objectives set out for this study. However, as this study aims to analyse marketing strategies from a holistic perspective, this requires an understanding of all the elements that make up a marketing strategy, from consumer, product, company, and the environment that influences how these elements operate.

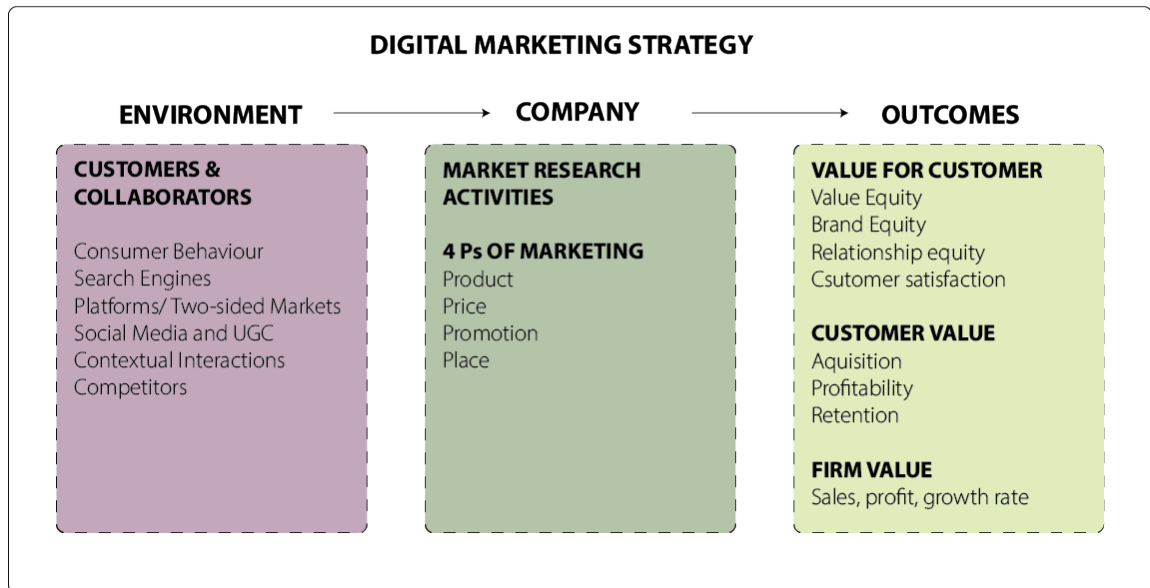
### **3.5 DIGITAL MARKETING STRATEGY FRAMEWORK**

It is essential to understand crucial aspects or concepts considered in a digital marketing strategy to assess the marketing strategies of identified South African fashion companies or brands. This section explores the fundamental principles and concepts applied to business and digital marketing strategies. A digital marketing strategy can assess and plan specific goals achievable through online channels (American Marketing Association 2021). The strategy relates to managing change and understanding the consumer environment and the channels best suited to interact with the consumer (Kingsnorth 2019).

The strategy must have the following criteria determined or established (Kingsnorth 2019). The first criterion is that it is important to know the company's value proposition and consequently know the company's brand identity (Twin 2020). The second criterion is that it is important to understand how the company's target consumer relates to market research and consumer behaviour. The third criterion is that a strategy must identify the changing variables that may benefit or negatively impact company value, such as sales, profit, and growth rate. The fourth criterion is reaching the customer and identifying how a company sets out to achieve this. The fourth criterion can be associated with place, one of the 4Ps of marketing (price, product, promotion, and place) outlined in section 2.3.1.1. The remaining Ps of marketing, price, product, and promotion would be related to the fifth criterion concerned with converting new consumers and retaining old consumers (Kingsnorth 2019). Lastly, the strategy must include a way of measuring success against each goal or aspect of the strategy.

Kannan and Li (2017) postulate the impact of digital technologies on the marketing of products and services, how they have affected customer preferences, and the increase in engagement and interaction of today's technologically savvy consumers. Developing a research framework motivated by digital marketing emphasises touchpoints in the marketing process and strategy (Kannan & Li 2017). Figure 3.3 depicts the framework

for research in digital marketing. According to Kanan and Li (2017:24), the framework “identifies the key touchpoints in the marketing process and strategies where digital technologies are likely to have a significant impact”. The framework demonstrates this by identifying three key areas: the environment of marketing strategy, the company and their core marketing concept, and outcomes that ensure value for the consumer and the company or firm (Kannan & Li 2017).



**Figure 3.3: Framework for Research in Digital Marketing (Kannan & Li 2017)**

Within these three main areas of the marketing strategy, the framework considers the impact of digital technology. The following sub-sections will explicate the three key touchpoints and the relevance and impact of digital technology. Digital technology and the information age have significantly changed the marketing environment as consumers have easier access to information and more choices, increasing their spending power. Due to the change in data acquisition after the digital age, consumer behaviour and the analysis of consumer interaction and their engagement of technologies in online and mobile contexts is crucial. This understanding and analysis of how consumers access information further impact the quality and price, customer expectations, the search process, and the resultant implications for the firm.

### 3.5.1 Environment

Companies must be mindful of other firms competing to acquire consumers within the environment. Thus, the digital marketing strategy of Kanan and Li (2017:24) also reviews

the “research on search engines and the interactions among customers, search engines, and firms”. Consumers generate their content for social media platforms, known as user-generated content (UGC), which offers marketers and companies opportunities for innovative collaboration and interaction with consumers. The environment touchpoint requires examination of the varied interactions of digital technologies through the various contexts of geography, regulation and piracy, privacy and security, and their subsequent implications for digital marketing. Kanan and Li (2017) refer to this as the contextual interactions that affect the environment.

### **3.5.2 Company**

The second essential touchpoint category is the company, and it outlines the marketing-related activities with which the firm must engage. Market research is an important activity that focuses on the acquisition and analysis of information generated from the use of digital technologies to comprehend the specific elements of the environment, actions, and outcomes that inform a firm’s marketing strategy (Kannan & Li 2017). Examples of such activities include researching the online browsing behaviour of consumers on websites, mobile sites, and applications. Another example would be investigating or examining online reviews, social interactions, and social codes or tags to understand how the market perceives a firm or brand (Kannan & Li 2017).

The next component of the company relates to the 4Ps of marketing (product, price, promotion, and place), which are introduced and explained in section 2.3.1.1 of chapter 2. This section will contextualise the 4Ps concerning its role in the digital marketing strategy framework. The concept of the product has seen some changes because of digital technologies. Firstly, these changes are related to offering customers new value propositions by realigning the core product with digital integrations; secondly to networking products through digital technologies to offer a difference in the value proposition; and thirdly, to changing products into digital services that may consist of a customisable, personalising, or interactive element made possible by incorporating innovation through digital technologies. These developments in digital products and personalised offerings affect the pricing and also present opportunities and possible challenges for the firm (Kannan & Li 2017). The pricing for online products and services is more differentiated and dynamic than brick-and-mortar businesses. This price differentiation is due to several reasons, one of them being that there are low search

costs for consumers, and the retailer's menu costs<sup>3</sup> are also low. The online shopping environment is accustomed to rapid changes, and retailers can respond to customer searches faster (Kannan & Li 2017). The online shopping environment has benefitted from digital technologies as they offer personalisation and interaction with product and service offerings. These are factors that are further developed through the promotion of a firm or brand online. Section 2.4.2 introduces innovative promotion methods for online-based products and service promotion content through digitisation. When assessing the effectiveness of the promotional content generated by a firm for its consumers, it is required to ascertain certain criteria, such as meeting customer expectations when it comes to value for the customer.

Kannan and Li (2017) discuss the fourth P of marketing, place, which concerns the digital age and how companies or firms now communicate with their consumers through smartphones, tablets, laptops, and computers. Studies have shown a preference for internet browsing or the consumption of marketing content on a smartphone versus a personal computer (Ghose, Goldfarb & Han 2013). Mobile devices offer current digital marketing channels, such as emails and mobile applications. Furthermore, customers' permeating usage of mobile devices in their everyday lives has developed into a lifestyle that heavily relies on mobile devices. Kanan and Li (2017:36) conclude the discussion of place by asking, "as customers are taking more control of their information search, how can firms identify the most appropriate place to contact the customers and motivate them to search for more information and make a purchase in an omnichannel world?" The question highlights the importance of research that explores the shopping behaviour of consumers of specific market segments (Kannan & Li 2017), such as Gen Z, for the marketing strategy to know where, when and how best to find them.

### **3.5.3 Outcomes**

The outcomes of a firm's actions within the market and consumer environment are classified into the value for the customers, which encompasses the objectives of value

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<sup>3</sup> The menu costs refer to the transaction costs that a firm or business incurs when they change the prices of a product or service. A cause for menu costs may arise when there is a significant difference or change in the business' current price offering and the equilibrium or benchmarked market price (ref Kenton)

equity, brand equity, and relationship equity (Kannan & Li 2017). The other key objectives that the firm aims to achieve include customer satisfaction, customer value and the firm's value (Kannan & Li 2017). In applying the digital marketing strategy framework, these elements are examined and explored against the relevant digital marketing methods and outcomes. Studies have examined factors such as value for the customer in e-commerce environments and how or what consumers associate value with when interacting with marketing communication or a firm's product or service online (Steenkamp & Geyskens 2006). Elements that consumers value relate to the level of online security and privacy protection that the site offers and customisation within the online channel for the consumer (Deloitte 2024). Brand equity and relationship equity relate to brand loyalty. In addition, all the actions associated with ensuring consumers' perception of the brand yield positive effects, resulting in an increase in sales (Hayes 2021). Studies have examined these elements of the digital marketing strategy by comparing the level of customer satisfaction with a firm's product or service offerings in online channels versus offline (Lazaris et al 2021).

Each of the three frameworks contributes something valuable to the study, but their key attributes are not related. Literature reveals that the premise of the empathic design approach and the digital affect framework prioritises consumers' feelings, moods, or expressions to develop and communicate product information. At the same time, the digital marketing strategy framework seeks to explore marketing strategies within the context of digital media and communication to successfully position products in a market now driven by digital and technological innovation. Therefore, the digital marketing strategy provides an approach to understanding how the digital component of marketing communication impacts a company's marketing strategy.

The Gen Z consumer market segment is still emerging and shows great potential in the spending power that Gen Z consumers possess (MediaUpdate 2019; Africa Dialogue Series 2023; Kuyoro et al 2023). The insights from each of the explored frameworks are better seen as part of an integrated model for understanding consumer behaviour and how marketing strategies can best align with this emerging consumer segment. In addition, the digital age and Gen Z being digital natives further support the conceptualisation of an integrated model exploring these concepts. In this study, the key attributes of each theory are integrated according to their applicability to the study's objectives, which are detailed below.



### 3.6 DIGITAL MARKETING EFFECTIVENESS FRAMEWORK (DMEF)

A conceptual framework was developed to illustrate the anticipated relationship between the study variables. The DMEF framework defines the relevant objectives of the research process and maps out how distinct variables have been integrated to delineate coherent data and interpretations (Swaen & George 2022). It is recommended that a conceptual framework be constructed before data collection (Swaen & George 2022).

The digital marketing effectiveness conceptual framework combines the empathic design approach from Leonard and Rayport’s perspective of consumer needs and perceptions, centred on developing product communication. The theoretical framework of the digital marketing strategy (for research) offers the DMEF a wider scope encompassing key components that influence the value proposition and the subsequent digital hedonic rhetoric and digital stimulus. The name of the conceptual framework stems from the key objectives and research areas to which the framework is applied in this study.

Table 2.1 presents a concept mapping of the three integrated frameworks. Concept mapping is a helpful tool that assists in defining the DMEF and visually demonstrating how the framework is intended to be applied (Grant & Osanloo 2014).

**Table 3.1: Concept mapping of the selected frameworks to be integrated**

Outline of the frameworks	Empathic design	Digital affect	Digital marketing strategy
	Observation	Value proposition	Environment
	Collect data / define	Digital hedonic rhetoric	Company
	Ideate / brainstorm	Affect = emotions + feelings + moods	Outcomes
	Prototype	Digital stimulus	
	Test		
	Key:  = Applied  = Not applied		
DMEF	<ul style="list-style-type: none"> <li>Empathy / empathic inferences</li> </ul>	<ul style="list-style-type: none"> <li>Value proposition</li> <li>Digital hedonic rhetoric</li> </ul>	<ul style="list-style-type: none"> <li>Environment</li> <li>company</li> </ul>

	• Collect data/ define	• Digital stimulus	• Outcomes – value for customer + customer value
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Through concept mapping, elements of the separate frameworks that are not used in the integrated DMEF model are eliminated. Table 3.1 includes a key where components highlighted in green indicate their application or inclusion in the DMEF, and those highlighted in red indicate those that will not be applied. Table 3.1 indicates components the DMEF will not be applying and the reasons for this. Since the focus of the study is not to understand consumer emotions or perceptions of the marketing strategies but rather an evaluation of the marketing strategies against certain criteria, this study will not focus on the exploration of insights related to consumers' feelings or perceptions. Components of the respective frameworks that will not be applied include the ideating, prototype and testing phases of the empathic design approach's paradigm. These phases were excluded due to the nature of the study, which does not intend to develop a product or service. Secondly, the component of determining consumer affect related to mood, emotion, and feelings from the digital affect framework is not applied. This component was not applied based on crucial reflection and consideration of the outlined objectives of this study.

The study focused on producing new knowledge related to digital marketing strategies targeted at Gen Z fashion consumers and identifying effective measures to enhance a company's marketing strategy, not directly exploring how Gen Z consumers feel about marketing communication. In order for the study to accomplish its objective, the DMEF intends to assess the current marketing strategies of nine fashion companies by evaluating key components of the marketing strategy against the criteria of the conceptual framework.

The criteria of the DMEF, outlined at the end of Table 3.1, include the following components from the three integrated frameworks.

- **Empathic design:** Observation and collecting and defining data
- **Digital affect framework:** Value proposition, digital hedonic rhetoric, and the digital stimulus
- **Digital marketing strategy (for research):** Environment, company, and outcomes.

Table 3.2 places the study’s research question and sub-questions in the context of the criteria of the DMEF. The table demonstrates how the study’s objectives relate to the three selected theoretical frameworks and further breaks down the key insights of the frameworks in conjunction with the study’s research questions. The study’s exploration of social media’s impact on how fashion products are marketed to Gen Z consumers is associated with the evaluation of the value proposition, digital hedonic rhetoric, and the digital stimulus of a fashion company or companies, which the conceptual framework analyses in later chapters of this study. Understanding Gen Z consumer behaviour through digital channels managed by fashion companies, as well as publicly accessible social media sites, can assist in assessing the effectiveness of the company’s value proposition and the effectiveness of consumer interaction with the company brand and product.

The framework positions each company’s relation to the digital marketing environment and how a fashion company adheres to relevant market-dependent variables such as socio-economic factors. Furthermore, considering environmental factors, the company must ensure successful outcomes related to sales and consumer loyalty. Holistically, the DMEF intends to delineate emerging opportunities for marketing strategies targeted toward Gen Z consumers.

**Table 3.2: DMEF Application to the Study’s Objectives**

<b>Research question:</b> What are the digital strategy gaps in the fashion industry’s marketing communication with South Africa’s Gen Z consumers?	
<b>Sub-questions of the study</b>	<b>Application of the DMEF</b>
<b>Sub-question 1:</b> How can social media positively or negatively impact digital communication in the marketing of fashion products and services to its Gen Z consumers?	<ul style="list-style-type: none"> <li>• Value proposition</li> <li>• Digital hedonic rhetoric</li> <li>• Digital stimulus</li> </ul>
<b>Sub-question 2:</b> What criteria related to digital fashion communication methods are expected by Gen Z consumers that are influenced by societal factors and informs their purchasing decisions?	<ul style="list-style-type: none"> <li>• Empathy / empathic inferences</li> <li>• Collect data / define</li> <li>• Environment</li> <li>• Outcomes – value for customer + customer value</li> <li>• Company</li> </ul>
<b>Sub-question 3:</b> How can the establishment of a model evaluating the effectiveness of digital fashion marketing	<ul style="list-style-type: none"> <li>• Holistic intention of the DMEF</li> </ul>

strategies to GenZ inform and develop relevant digital marketing communication strategies for Gen Z fashion consumers?	
<b>Sub-question 4:</b> What are the emerging trends that industry should adopt to maximize their marketing results with Gen Z consumers?	<ul style="list-style-type: none"> <li>• Holistic intention of the DMEF</li> </ul>

### 3.7 SUMMARY

The theoretical framework of a study forms the boundaries upon which the thesis is built. This study's conceptual framework is titled the DMEF. The framework integrates theoretical concepts and insights from the empathic design approach's paradigm, the digital affect, and the digital marketing strategy frameworks. The chosen theories and subsequent constructed conceptual framework apply to this study's objective as it focuses on producing new knowledge related to digital marketing strategies targeted at Gen Z fashion consumers and identifying effective measures to enhance a company's marketing strategy.

The DMEF delineates emerging opportunities for marketing strategies targeted toward Gen Z consumers. Through the investigation of existing literature and the outlined objectives of this study, the framework was applied to a minimum of nine fashion companies and assessed based on the effectiveness of their digital marketing strategies according to the criteria outlined in the conceptual framework. It is apt that this chapter concludes with the construction of the conceptual framework as it corresponds to the process and explanation of how the conceptual framework was applied as a method of unearthing applicable and effective digital fashion communication strategies targeted at the digitally astute and emerging consumer segment, Gen Z.

## CHAPTER FOUR: METHODOLOGY

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The previous chapter presented the theoretical framework that frames this research and introduced and contextualised the emergent DMEF. Critical theories that delineated this study's objectives and from which DMEF was conceptualised were presented. These are the empathic design approach, and the digital affect and the digital marketing strategy frameworks. As an emergent framework, the DMEF seeks to unearth and discover new knowledge about digital marketing strategies targeted at Gen Z fashion consumers and identify practical measures to enhance companies' marketing strategies.

This chapter explicates the chosen research methodology guided by an interpretivism research paradigm. The interpretivism paradigm is based on people's perceptions, ideas, and meanings shaped by their lived experiences, and it employs subjective exploration in the analysis and interpretation of the data. Netnography is presented as the main method of analysis and was applied to analyse this study's two phases of data collection. The chosen methodology elucidates and substantiates how the study used them in the application of the DMEF. Lastly, discussions explaining the ethical considerations and measures identified to ensure the validity and trustworthiness of the study's findings are presented.

### 4.1 DESIGN OF THE STUDY

This study applied a mixed-method research approach to explore and evaluate the effectiveness of fashion companies' digital marketing strategies targeted at Gen Z consumers. A mixed-method approach is valuable when the research statement or question explores different components of the same phenomenon, such as the experience and behavioural reaction, while simultaneously comprehending and identifying emerging trends, exploring associations or correlations, and documenting risks or challenges (Morse & Niehaus 2016).

Studying various aspects of a phenomenon is also referred to as the forms of micro and macro levels or stages in the research process (Bryman 2004). The micro level involves the qualitative research strategy concerned with the exploration of experiences and behaviours. The macro level leans towards the application of quantitative research to

determine and evaluate identified patterns or frequencies of a phenomenon, and this was achieved through surveys (Cooper & Schindler 2011).

Survey research can be facilitated through face-to-face or online communication channels with the aim of collecting information “about one or more groups of people—perhaps about their characteristics, opinions, attitudes, or previous experiences—by asking them questions and tabulating their answers” (Leedy & Omrod 2015).

**Table 4.1: List of all the fashion companies reviewed before the final selection**

RETAILER	WEBSITE	SOCIAL MEDIA
MR Price	<a href="#">Link</a> – SA	<a href="#">Instagram</a> 1.2m followers <a href="#">X (Twitter)</a> 152.9m followers <a href="#">TikTok</a> 357.2K followers <a href="#">Facebook</a> 2.3m followers
THE FIX	<a href="#">Link</a> – SA	<a href="#">Instagram</a> 796K followers <a href="#">Twitter</a> 9469K followers <a href="#">TikTok</a> 169.5K followers <a href="#">Facebook</a> 713K followers <a href="#">YouTube</a> 6.64K followers
COTTON ON	<a href="#">Link</a> – SA	<a href="#">Instagram</a> – SA 548K followers <a href="#">Twitter</a> 34.3K followers – Australia <a href="#">TikTok</a> – Australia 217.7K followers <a href="#">Facebook</a> – SA 1m followers
H&M	<a href="#">Link</a> – SA	<a href="#">Instagram</a> International 38.4 m followers <a href="#">X (Twitter)</a> – SA 81K followers <a href="#">TikTok</a> – International 418.6K followers <a href="#">YouTube</a> – International 439K followers <a href="#">Facebook</a> – SA 40m followers
FACTORIE	<a href="#">Link</a> – SA <a href="#">Link</a> –SA	<a href="#">Instagram</a> – AU 453K followers <a href="#">Instagram</a> – Africa 76.5 <a href="#">TikTok</a> – 9.8K followers <a href="#">Facebook</a> – AU 334K followers <a href="#">Twitter</a> – AU 4810 followers
YDE	<a href="#">Link</a>	<a href="#">Instagram</a> 183K followers <a href="#">X (Twitter)</a> 21.5K followers <a href="#">TikTok</a> 22.3K followers <a href="#">Facebook</a> 709K followers

EGG	<a href="#">Link</a>	<a href="#">Instagram</a> 55K followers <a href="#">Facebook</a> 22K followers <a href="#">X (Twitter)</a> 731 followers <a href="#">TikTok</a> 1014 followers
ZARA	<a href="#">Link SA</a>	<a href="#">Instagram</a> 61.4m followers <a href="#">Facebook</a> 315K followers <a href="#">X (Twitter)</a> 81.7K followers <a href="#">Tik Tok</a> 10.2m followers
SHEIN	<a href="#">Link</a> <a href="#">Link SA</a>	<a href="#">Facebook</a> 31m followers <a href="#">Instagram</a> 32.1m followers <a href="#">X (Twitter)</a> 8142 followers <a href="#">YouTube</a> 689K followers <a href="#">TikTok</a> 9.2m followers
Legit	<a href="#">Link</a>	<a href="#">Facebook</a> 890K followers <a href="#">Instagram</a> 498K followers <a href="#">TikTok</a> 32.6K followers

A mixed-method research approach, or a combination of quantitative and qualitative research, ensures triangulation to increase the perceived quality and reliability of the conducted research (Bryman 2004; Cooper & Schindler 2011). Applying a mixed-method approach in this study sought to identify patterns in the nine fashion companies' digital fashion communication methods and media. The exploration of digital fashion communication included the public social media accounts owned by the respective nine chosen fashion companies, including Facebook Pages, Instagram, X (Twitter), TikTok, and YouTube accounts. Individual posts publicly shared on these social media were collected and analysed as data, specifically the level of consumer engagement through scrutiny of the comments and number of likes per account. In addition to the company's social media, the study also explored the e-commerce websites of the fashion companies. Furthermore, publicly accessible components that relate to the identified companies' digital marketing strategy and fall within the digital marketing strategy framework were collected (Kannan & Li 2017).

The second phase pertained to collecting the insights and experiences of Gen Z fashion consumers related to the nine fashion companies through an online anonymous fashion consumer survey. A fashion consumer survey can be understood as a research method collecting data about customer opinions, preferences, and experiences to assist fashion companies in improving their product and service offerings and marketing strategies (Certilogo 2023). The survey design constitutes the quantitative research method for this

study. Quantitative research methods, such as surveys, are used for accurate research to gather quantitative numerical data, from which statistical inferences are made (Esteban-Bravo & Vidal-Sanz 2021). The fashion consumer survey offered relevant insights into the secondary data of the nine fashion companies by auditing or verifying the effectiveness of digital fashion communication methods and media marketing to the Gen Z consumer cohort.

The study employed an exploratory sequential research design. This research design is applied when a researcher wants to follow up “qualitative findings with quantitative analysis” (Edmonds & Kennedy 2019). The key objective of the exploratory sequential design is to explore how qualitative approaches can improve the quantitative measures of evaluation for a relevant study. The secondary data was identified as relevant based on the study's objectives and conceptual framework constructed in section 3.3 to delineate the level of effectiveness against the model's criteria. Once the qualitative data was collected and analysed, the qualitative findings informed the quantitative Gen Z fashion consumer survey. The data collected from the Gen Z sample group through an online anonymous survey offered the study's quantitative results, which were analysed to identify whether the qualitative findings could be corroborated. The Gen Z sample was recruited through social media posts shared on WhatsApp, Instagram, TikTok, tertiary education learning management software, email announcements (Blackboard or Moodle), and face-to-face interaction.

## **4.2 RESEARCH PARADIGM**

In this study, an interpretivist paradigm was adopted, and its characterised by the subjective exploration and interpretation of knowledge and truth based on people's cultural and historical experiences (Ryan 2018). Collins (2018) posits that interpretivism rejects objectivism, but at the same time, it is not merely a subjective account of a phenomenon. Rather, it is an account essentially reflecting significant qualities of culture and the phenomenon.

Contributions to the origin of the interpretivist paradigm can be dated back to the eighteenth century when philosopher Giambattista Vico argued that there is a significant distinction between the natural and social worlds (Costelloe 2022). This distinction lies in

the social systems and experiences that form our perceptions of reality and what is true (Collins 2018:48):

Interpretivism rejects objectivism, but it is not a subjectivist philosophy either. The world is 'waiting to be discovered' or 'loaded with the meaning' for social constructionists. That is, the world and things in it are seen to be important participants in the meaning-making process.

The application of interpretivism to research can be best understood or contextualised through four main approaches or influences. These approaches are hermeneutics, verstehen, symbolic interactionism, and phenomenology (Bryman 2016).

The first influence on the interpretivism paradigm, hermeneutics, is defined as understanding and interpreting human actions through text or documents to inform and generate cultural and historical knowledge (Lewis-Beck, Bryman & Futing Liao 2012; Ryan 2018). Bingham (2010) refers to hermeneutics as the art of interpretation, and Bryman (2016) characterises hermeneutics as an empathic recognition of human action. The second influence on the interpretivism paradigm can be interpreted to accompany the approach of hermeneutics and is referred to as verstehen. Versteheren is a German term which translates to understanding. As an approach, verstehen concerns the understanding and explanation of social action (Bryman 2016) established on "socially produced systems of meaning" (Lewis-Beck, Bryman & Futing Liao 2012).

With the provided explanation of the interpretivism paradigm, this study is aligned with interpretivism as it explores the behaviour of Gen Z fashion consumers to interpret and evaluate the effectiveness of the targeted digital fashion marketing strategies. The influence of hermeneutics is aligned in this study with the analysis of online documents of fashion companies' marketing strategy and communication. The theory of verstehen was incorporated as the study focused on producing new knowledge about digital marketing strategies targeted at Gen Z fashion consumers and identifying effective measures to enhance the companies' marketing strategy. The formulation of this study's conceptual framework, constructed and explained in section 3.3, was applied to existing marketing strategies and allowed this study to explore opportunities for marketing strategies for Gen Z consumers.

### **4.3 STUDY SETTING, SAMPLING, AND SAMPLE SIZE**

This study evaluates the effectiveness of digital fashion communication methods and the marketing strategies targeted at Gen Z fashion consumers. Therefore, the study identified two samples. The first sample is the nine fashion retail companies, and the second sample is the Gen Z cohort. The proposed study's unit of analysis comprises nine identified fashion retail companies based on purposive sampling criteria. Selected South African operating fashion companies that this study explored as subjects included Bash, Cotton On, Factorie, H&M, Mr Price, Legit, Shein, The Fix, YDE, and Zara.

The selection of purposive sampling for this study is applicable because the selection of units of analysis directly references the research question and sub-questions that the study aims to address (Bryman 2016). The sample methods applied in this study were selected by purposive snowball sampling. Purposive snowball sampling is a non-random sampling method combining purposive sampling and snowball sampling to recruit participants. Also referred to as selective sampling, this type of non-probability sampling is commonly used when the researcher wants to gain insights into the views or perceptions of a group from whom the most can be learnt rather than those of the whole population (Merriam 2009).

The study's research question focuses on the digital marketing strategy gaps in the fashion industry's marketing communication that is targeted to South Africa's Gen Z consumers. Consequently, the unit of analysis that this study explores is the marketing strategies of fashion companies that target their products to Gen Z consumers. The emergent conceptual framework presented in section 3.3 was applied to identify key sampled fashion companies which formed phase one of this study. After the collection and analysis of the nine fashion companies' digital fashion communication marketing strategies, an online survey was conducted.

The online survey served to verify the secondary data collected through social media and ensure that the online communication and interaction analysed as secondary data in phase one aligned with the survey responses from the Gen Z participants. The sample size of the Gen Z participant's responses amounted to 153 responses. The sample criteria for identifying the relevant Gen Z participants included the following:

- The participants are between 18 and 28 years old. Studies suggest that the oldest individuals of Gen Z are aged between 23 and 28 as their year of birth ranges between 1996 to the early 2000s (Thangavel, Pathak & Chandra 2019; Cantoni et al 2020a; Dimock 2019b)
- The participants should be the main or sole decision-makers when making clothing purchases for themselves. This criterion allows the study to critically identify and analyse consumers' preferences regarding their shopping experience.

In reflecting on the applied sampling method, the use of oversampling through broad survey distribution, both via social media channels and by seeking gatekeepers' permission to share the participation link with multiple universities across South Africa requires considerations about representativeness and generalisability of the Gen Z sample that completed the survey. While these methods effectively increased response numbers and facilitated access to a geographically dispersed audience, they may also have unintentionally concentrated participation among certain demographic groups, notably students and digitally savvy urban youth.

It could be argued that the reliance on online recruitment, particularly through social media, inherently favours individuals who are active in digital spaces, have reliable internet access, and are comfortable engaging with online surveys. Similarly, distribution through university channels is more likely to reach those in tertiary education, who may differ in significant ways such as income, lifestyle, or consumer habits or less digitally connected Gen Z individuals. This concentration could limit the extent to which findings can be generalised to the broader population.

A sample size of 153 survey responses is justified for this study as it provides meaningful relationships between the secondary data collected in phase one to corroborate the experiences and opinions observed through the comments sections of the nine social media accounts of the fashion companies. In addition to justifying the final sample size, the study takes into consideration the nature of the survey. The survey was an online anonymous survey distributed to participants via online communication such as emails and social media posts shared on Instagram, Facebook, TikTok, and LinkedIn. The social media accounts used included that of the researcher. In addition, the researcher requested assistance in distributing the survey link with a corresponding research poster depicted in Figure 4.1 by completing gatekeeper's letters for public and private institutions

to gain widespread engagement with the survey. Appendix A details the approved permission to share the poster with private institutions in South Africa located in Gauteng and Durban.

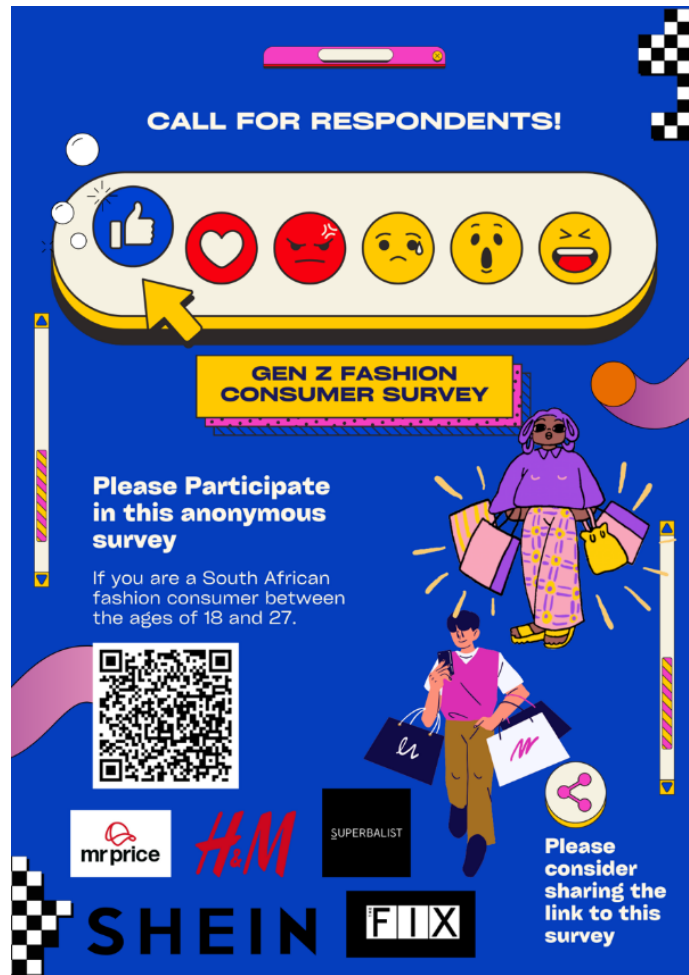


Figure 4.1: Survey Invitation Poster Designed by the Researcher

#### 4.4 DATA COLLECTION METHODS

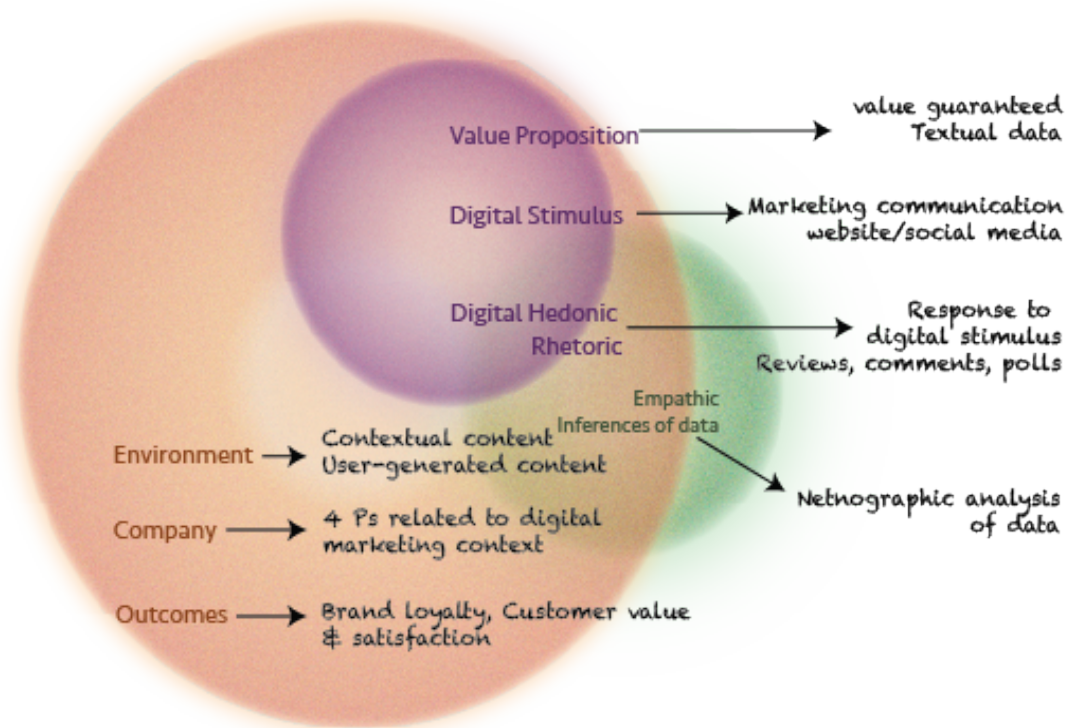
For the first phase of data collection for this study, an online document analysis of secondary data was undertaken regarding the nine fashion companies' digital fashion communication channels, such as websites and social media platforms. Secondary data can be understood as documents that are publicly available and accessible to social researchers to assemble and analyse (Bryman 2016).

Once the secondary data was collected, considerable rigour and interpretive skill were applied to deduce meaning from the chosen materials. Criteria for the selecting of secondary data for the purpose of research often meet the following criteria (Bryman 2016):

- The data was not produced for the specific purpose of the research study.
- The data can be read literally (this criterion also refers to the secondary data being read through the identification of non-verbal cues, such as visual symbols applicable to photographs or virtual media).
- The data must be relevant to the concerns of the research study.

This study collected textual and pictorial data from the online documents of the identified fashion retail companies operating in South Africa. The relevant textual data included online and in-store publications from the fashion companies outlining the marketing activities and strategies. The conceptual framework of this study informed the relevant data required for the evaluation of digital fashion marketing strategies and communication methods according to the developed criteria of the conceptual framework. This exploration started in December 2023 and ended in August 2024. A table was created that included the URLs of each company's business websites, links to its social media channels and the number of followers on each platform as recorded in Table 4.1.

The second phase of data collection for this study was an online anonymous Gen Z fashion consumer survey. A survey was designed for research to acquire information about Gen Z consumers as the main informants of this study (Leedy & Omrod 2015). The online survey included questions about the findings from analysing the secondary data collected from the nine fashion companies in phase one. The purpose of the survey was to validate and ensure the credibility of the applied conceptual framework to current marketing strategies and digital fashion communication methods and its subsequent delineations to the data emergent from this study. Figure 4.2 offers a visual overview of the conceptual framework and how the data collection activities were informed by the DMEF and this study's objectives.



**Figure 4.2: Digital Marketing Effectiveness Framework (DMEF) in Relation to Relevant Methods**

#### 4.4.1 Researcher as a Data Collection Instrument

The study's methodology requires reflection on the researcher's role as a data collection instrument. In this case, the researcher is a crucial research instrument in data collection, analysis and interpretation. This involves using their own skills, perspectives, and experiences to observe, interact, and engage with the data effectively. Thus, the researcher's ability to interpret nuances, emotions, and cultural contexts ensures a deeper and more comprehensive understanding of the phenomena being studied. This role is significant in maintaining reflexivity and preventing biases and preconceptions that can influence the research process. Therefore, it is important for the researcher to be critical to enhance the credibility and reliability of their findings. The study's focus on collecting and analysing highly visual and affective content required consideration of ways of mitigating the potential for researcher bias in both interpretation and analysis. Visual and emotive materials often evoke subjective responses, which can be influenced by the researcher's own experiences, preferences, or cultural background. To mitigate this risk, a clear coding framework was developed prior to data analysis, based on

established literature and the DMEF pre-defined elements that aligned with the study's research questions. The DMEF provided predefined criteria and descriptors, reducing the likelihood of ad hoc or inconsistent interpretation. Secondly, coding and analysis were conducted in an iterative process, with regular cross-checking against the DMEF to ensure alignment and consistency. Where interpretation was uncertain, reflexive notes were made to document thought processes and decision-making during the secondary data collection and analysis.

#### **4.5 DATA ANALYSIS METHOD**

Netnography was applied in this study to analyse the secondary data exploring South African fashion companies' digital fashion marketing strategies targeting Gen Z fashion consumers as well as the survey responses from the Gen Z participants. Netnography is an established method of qualitative research (Kozinets, Dolbec & Earley 2014; Ashman, Patterson & Kozinets 2021). The term is a combination of internet and ethnography. Netnography shares characteristics with ethnography, allowing the researcher to explore, identify and explain diverse cultural and social worlds.

Netnography is characterised by descriptive and analytical outcomes of analysis through the application of methods that yield rich and grounded interpretations of contextual data (Kozinets 2010; Kozinets, Dolbec & Earley 2014). The characteristics of netnography provide a comprehensive representation of the online experience of social members and online communities (Kozinets, Dolbec & Earley 2014; Grant, Botha & Kietzmann 2015).

Netnography emphasises the role of the researcher-as-instrument (Kozinets, Dolbec & Earley 2014) as the researcher becomes immersed in the computer-mediated context of the research. Previous studies that employed netnography through selecting suitable websites and social media discourse were found in the comments section of a brand's online published advertisements (Bolton et al 2015). The comments were collected as the contextual data from which the research sought to understand consumers' attitudes towards specific marketing and branding methods.

ATLAS.ti and Microsoft Excel were utilised to analyse the survey from the Gen Z participants' responses. This involved organising the data by grouping the data into themes and sub-themes. Such software is commonly used in marketing research to assist in organising the data into a formatted repository of structured data to interpret a

wide sample of digital fashion marketing strategy components to deduce relevant emerging trends.

#### **4.6 ENSURING RIGOUR**

In order to ensure the reliability and validity of the online data and further ensure trustworthiness in the analysis of the emerging data, systematic triangulation of various and crucial netnographic methods was conducted. Triangulation is defined as an “approach in verification using multiple sources (data collection methods) to contrast and compare study data” (Roller & Lavrakas 2015:364). This is “to establish supporting and or contradictory information to give the researcher and users of the research a more balanced and deeper understanding of the outcomes than relying on the study data alone” (Roller & Lavrakas 2015:364). Within the context of this research, triangulation was applied when the secondary data collected was evaluated in conjunction with data obtained by other methods, such as the visual analysis and interpretation of the emojis or emoticons used in the online screenshots of the nine companies’ social media posts and comments. The information from the triangulated data supported by other relevant or related studies was interpreted for authenticity.

Another aspect that had to be considered was the selection of the nine fashion companies over other fashion brands that Gen Z consumers may shop from. To ensure data bias, the survey, which served as member checks, included questions that probed the respondents’ loyalty to brands that were not selected as data subjects for this study. These findings are also analysed and reflected on in subsequent chapters.

#### **4.7 ETHICAL CONSIDERATIONS**

Before data collection activities can commence, it is important that rigour and consideration are applied to the ethical concerns related to the study. The researcher is responsible for identifying all possible ethical considerations and how to mitigate any unethical issues, as per the ethical approval certificate in Appendix A (Mbaleka 2019).

Anonymity and confidentiality of participants are crucial measures that must be put in place for netnographic research. Literature highlights the importance of implementing verifying systems that will ensure that the secondary data collected online is selected solely to fit the purpose of meeting the study’s research aims and objectives (Kozinets

2010; Ashman, Patterson & Kozinets 2021; Kozinets & Gambetti 2021a). Furthermore, ensuring that no unethical or incriminating information is included in the data is essential. In relation to the first phase of data collection, the confidentiality of the identified fashion companies does not require anonymity restraint as the data used in this study was publicly available and accessible. However, where the study analyses social media discourse in the comments section of social media advert posts, the commentator's social media alias remained anonymous in this study as there is no way to verify if the social media user is over the age of 18 or if they would consent to have their personal information included in this research. Maddox (Kozinets & Gambetti, 2021b) explains participant anonymity in relation to ethical considerations in netnographic research, which suggests that the researcher should not take an "online identity as a participant's real-world identity", but what is shared can still be perceived as an authentic experience. The study blacked out any mention of social media users' personal information and aliases that were included in the screenshots of the comments section of the secondary data.

Another key component of netnographic ethics is for the researcher to seek and include relevant feedback, referred to as member checks (Kozinets & Gambetti 2021b; Owa 2023). Member checks are required to validate the netnographic findings with the relevant community of participants to ensure the credibility and accuracy of the findings, hence the survey (Owa 2023). Studies that have employed netnography have done member checks in the form of in-person or virtual interviews through online forum spaces as well as online chat environments (Kozinets & Gambetti 2021). Subsequently, the second unit of analysis that the study investigated relates to the Gen Z online survey responses regarding consumer preferences.

The online survey assisted the research in validating and verifying the results from the secondary data analysis of the digital fashion marketing strategies and communication methods of the identified fashion retail companies. The ethical issues of this unit of analysis centre on its interaction with human participants. The participants between 18 and 28 were invited to participate in the online survey in person as well as via online communication such as email, social media, and university student online portal notifications. A cover letter is included on the first page of the online survey and is presented in Appendix B.

The survey distribution process followed a structured approach to ensure ethical compliance and to prevent any form of coercion. Invitations were disseminated through neutral, non-assessable channels, including official student mailing lists, online noticeboards, and institutional social media groups, rather than via lecturers in contexts where academic authority could be perceived as influencing participation. Where invitations were shared in social media groups, the invite was shared by an objective third party who had no connection to the study. A standardised invitation message was used across all platforms, outlining the study's purpose, eligibility criteria, estimated completion time, and a clear statement that participation was entirely voluntary. The first page of the online survey included an informed consent form, detailing participants' rights to withdraw at any time. The survey did not require participants to share personal information such as their names or contact details. However, the study requires the participants to indicate their age, as a purposive sample criterion requires the participants to be between 18 and 28. Participants were not obliged or coerced to take part in the study, nor held liable should they withdraw as a participant at any stage. The low-risk categorisation of this study meant that participants did not incite emotional or physical discomfort, discrimination, or any monetary loss. Furthermore, the nature of the questions asked in the survey was not harmful and did not incite prejudice or discrimination directed at any participant taking part in the study.

#### **4.8 SUMMARY**

The objective of this chapter was to outline the research methodology underpinning this study, which is guided by an interpretivist paradigm. Rooted in individuals' perceptions, ideas, and meanings shaped by lived experiences, this paradigm emphasises a subjective approach to data analysis and interpretation. Netnography was introduced as the primary method of analysis and applied across the study's two-phase data collection process. The phases were the collection and analysis of secondary data from nine fashion companies operating in South Africa, and the collection of primary data through the online anonymous fashion consumer survey. The chosen methodology clarifies and justifies how these approaches were employed in the application of the DMEF. Finally, the chapter discusses the ethical considerations and the measures taken to ensure the validity and trustworthiness of the study's findings. In addition, discussions detailing the process of distributing the anonymous survey to potential participants through various universities by gatekeeper's letter were unpacked. The study's employed research

approach and methodology were applied to the data collection and analysis using Atlas.ti and Microsoft Excel. Subsequently, the next chapter discusses the study's findings.

## CHAPTER FIVE: DISCUSSION OF FINDINGS

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As outlined in Chapter 4, the data collected were categorised into two phases. Phase one consisted of collecting secondary data from nine fashion companies operating in South Africa. The data collected consisted of the nine companies' digital fashion communication media and channels. This data included the companies' publicly published social media accounts, e-commerce websites, and retail reports. The focus of collecting and analysing the secondary data was to identify the methods and practices of digital fashion communication. Phase two consisted of the design and distribution of an online anonymous Gen Z fashion consumer survey. The survey aimed to gain insights into the South African Gen Z consumer preferences and experiences related to digital fashion communication strategies and methods.

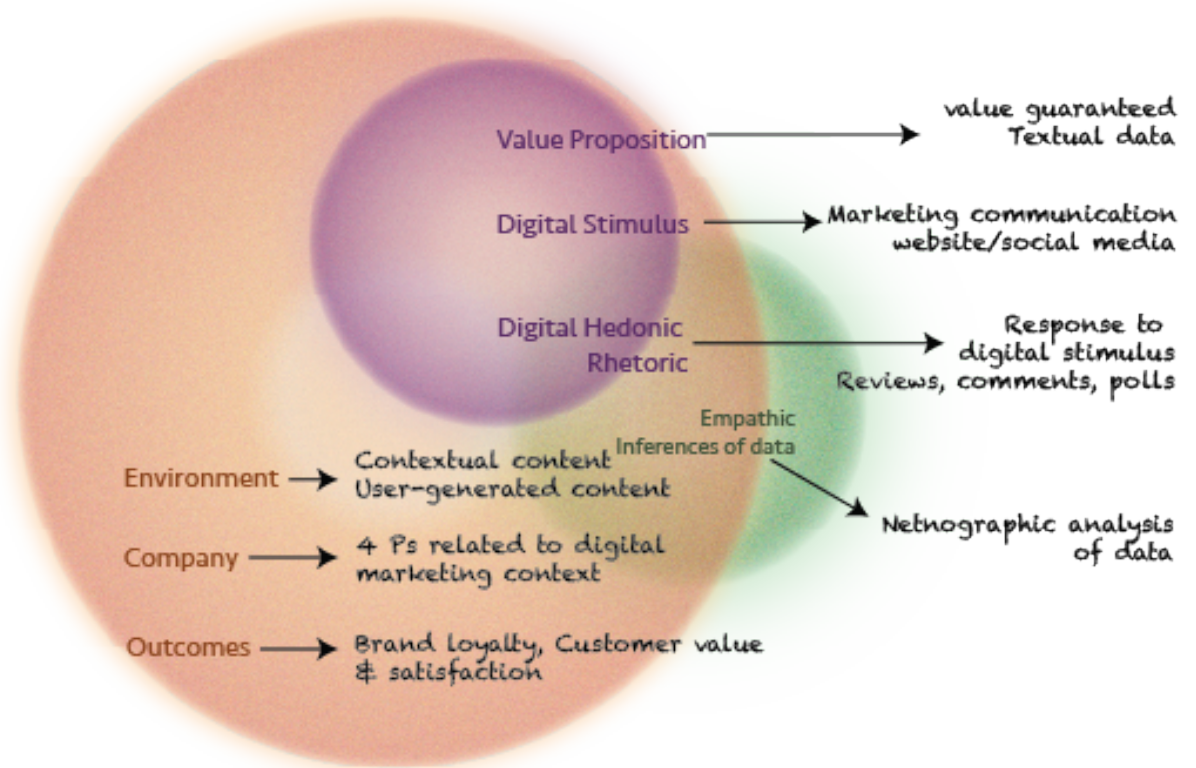
Chapter 5 is a crucial component of this study as it presents the data collected and discusses the findings analysed through netnographic analysis. Section 5.2 details the findings from the secondary research of the nine fashion companies. The data was grouped and discussed according to the outlined areas presented in Figure 5.1. The corresponding Table 5.1 lists the information categorised and discussed in this section.

### 5.1 INTRODUCTION AND OVERVIEW OF THIS CHAPTER

The lavender hue in Figure 5.1 and Table 5.1 represents the information pertaining to the company, which will include a description of the company, its origin, the value proposition, and its identified target market. The discussion is related to each company's digital stimuli, which refers to the digital fashion communication media and channels they publish, share, interact with, and through which they promote their product and value proposition. The discussion of the digital stimulus is in relation to the kinds of digital communication the company creates and how its consumers engage with the digital stimulus. In this study, the analysis and understanding of the consumer's response to digital fashion communication refer to the digital hedonic rhetoric, explained in detail in section 3.1.1.

The burnt orange hue represents the environment, the contextual evidence that the collected digital fashion communication exists within, and the identified relevant factors that contribute to engagement and consumer satisfaction. The factors that will be

discussed under the environment refer to the company's product, promotion, place or location and the level of satisfaction the Gen Z consumer perceived regarding the 3 Ps. The fourth P, relating to price, is analysed in the second phase of data collection. Screenshots of the various digital stimuli will accompany the discussion in section 5.2. The discussion of the nine fashion companies will be in the following order listed alphabetically: Cotton On, Factorie, H&M, Mr Price, Shein, The Fix, YDE, and Zara.



**Figure 5.1: Conceptual framework applied to the discussion of findings**

**Table 5.1: Key Headings data will be analysed and discussed in section 5.2**

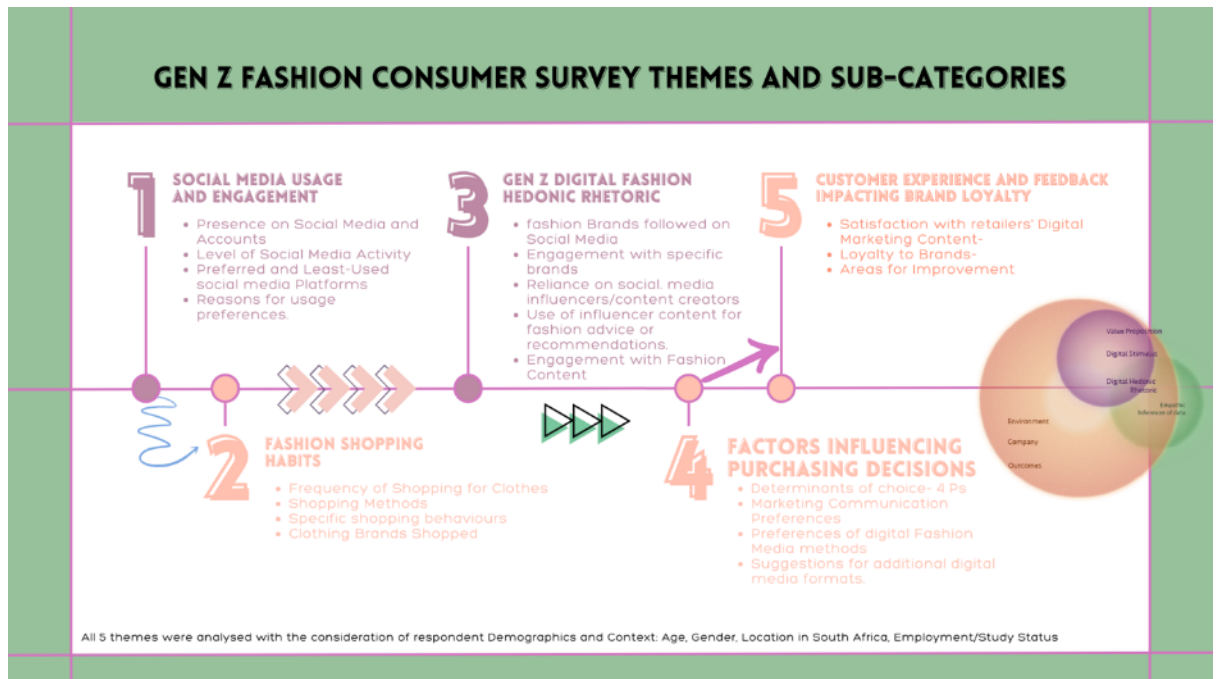
SECONDARY RESEARCH AND ANALYSIS OF SELECTED FASHION COMPANIES							
		Digital stimuli		Value proposition		The environment	
Fashion company	Retail channels	Website	Social media	Company description	Target market	The company	Digital hedonic rhetoric

**Section 5.2** detailed the qualitative findings of the secondary data that was collected and analysed. Section 5.3 will unpack the second phase of data collection, which was the Gen Z fashion consumer survey. A total of 153 responses were collected for the survey. Of the 153 survey responses, the demographic represents eight South African provinces, namely, the Eastern Cape (EC), Gauteng (GP), KwaZulu-Natal (KZN), Limpopo, Mpumalanga, Northern Cape (NC), North West (NW) and Western Cape (WC). Table 5.2 presents the data for all eight provinces and the total percentage represented per province.

**Table 5.2: Survey Responses Grouped According to Province**

TOTAL SURVEY RESPONSES PER PROVINCE	153	100%
EC	24	15,58
GP	91	59,09
KZN	21	13,64
LIMPOPO	1	0,65
MPUMALANGA	1	0,65
NC	2	1,30
NW	3	1,95
WC	10	6,49

This research categorised the 29 survey questions into themes and sub-categories (see Figure 5.2). The colour coding of the main themes will apply the same colours used in Figure 5.1, which depicts how the study’s conceptual framework informed the data collection and analysis.



**Figure 5.2: Themes for discussing the findings of the survey**

The five themes are described as the following and correspond to the information presented in Figure 5.2:

1. Social media usage and engagement
  - Presence on social media and accounts
  - Level of social media activity is very active (time-based frequency), somewhat active, rarely active
  - Preferred and least-used social media platforms
  - Reasons for social media usage preferences
2. Fashion shopping habits
  - Frequency option of shopping for clothes ranges from twice a month to once a year or "other" (with explanation)
  - Shopping methods include physical stores, online, or a combination
  - Specific shopping behaviours (e.g., browsing online but purchasing in-store)
  - Clothing brands shopped include the nine fashion companies and other frequently shopped brands
3. Brand interaction and influence (Gen Z digital *fashion* hedonic rhetoric)
  - Fashion brands followed on social media

- Engagement with specific brands or additional ones not listed.
  - Reliance on social media influencers/content creators
  - Use of influencer content for fashion advice or recommendations.
4. Factors influencing purchasing decisions (environment)
- Engagement with fashion content is measured as a percentage of social media content consumed related to fashion and style
  - Determinants of choice include price, promotions, availability, style, trends, brand reputation, sustainability, reviews, or "other" (with explanation)
  - Marketing communication preferences include ways of receiving information (e.g., email, social media ads, influencer collaborations)
  - Digital fashion media methods are ranked preferences for videos, images, polls, giveaways, etc.
5. Customer experience and feedback impacting brand loyalty
- Satisfaction with retailers' digital marketing content is a rating satisfaction for specific brands using emoji-based scales.
  - Brand loyalty to brands is determined by the frequency of shopping and engagement
  - Areas for improvement are collected suggestions for retailers (product value, pricing, marketing content, or all)
  - Factors influencing one's purchasing decision (price, product, promotional content).

## **5.2 PHASE ONE: DISCUSSION OF SECONDARY DATA**

As mentioned in the introduction and outlined in Table 3.1, the secondary data discusses the nine selected fashion companies. The selection process began with identifying and listing fashion company retailers that operate in South Africa. This exploration started in December 2023 and ended in August 2024. A table was created that included the URLs of each company's business websites, links to its social media channels and the number of followers on each platform. In addition, each table includes a collage created by the researcher comprising some of the social media content that was collected and reviewed as secondary data. As mentioned in the ethical considerations in section 4.7, the account usernames included in the comments sections of all reviewed content have been blacked out. It was also important to ensure that the collage was legible when zooming in; thus,

software such as Adobe Illustrator and Adobe Acrobat were used in designing all nine collages.

After this process, the fashion companies were categorised as either brick-and-mortar retailers, e-commerce-only retailers, or multichannel retailers. The selection of South African-based fashion companies was influenced by several factors outlined in section 4.3 of the methodology chapter. Initially, 11 fashion companies were identified, 10 of which met the criteria for targeting Gen Z consumers. One of the identified companies explicitly stated that their target market was Millennials, citing that Gen Z does not yet possess sufficient buying power.

After reviewing all 11 fashion companies based on the sample criteria, the final selection of nine fashion companies was confirmed. The conceptual framework of the study was then applied to guide the kinds of secondary data to be collected. Table 5.1 above represents the categorisation of themes under which the secondary data is discussed.


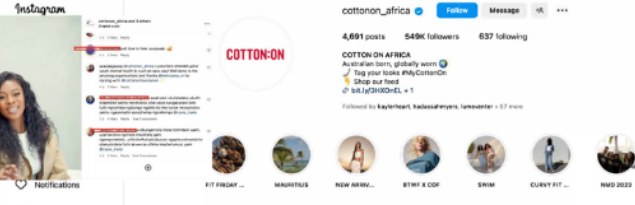
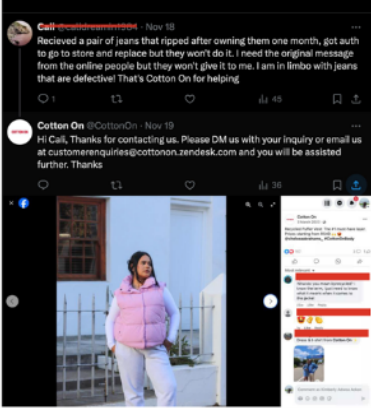
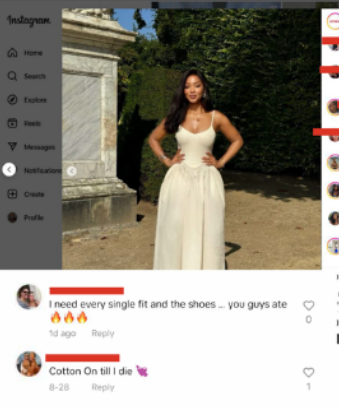
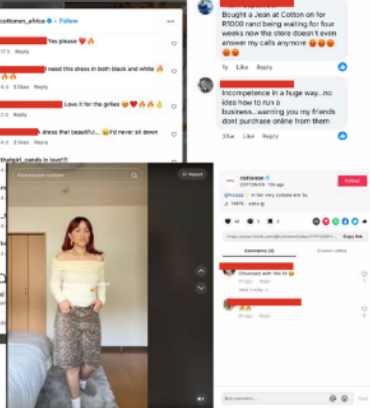
The findings will be discussed under the following key terms:

- **Target market:** The fashion company's target market will be defined according to age range.
- **Company description:** An overview of the fashion company's origin and current operational setup will be explained.
- **Value proposition:** The fashion company's value guarantee or promise to its consumers is presented and explained. This value guarantee may include direct quotations in italics to differentiate from the researcher's interpretation and discussion. Where applicable, the fashion company's mission and values may be included in this discussion.
- **Environment and digital hedonic rhetoric:** This discussion begins with an overview of the core marketing aspects. It includes three of the 4Ps (price, product, promotion, and place). Namely, the fashion products that the retailer sells, the place where the consumer can purchase the product, and all the promotional strategies made to market to the targeted Gen Z consumer online.

Online marketing methods and media are also referred to as digital stimuli and are discussed by referring to the various social media channels through which the fashion company communicates and interacts with the Gen Z consumer cohort. Digital hedonic

rhetoric is analysed based mainly on the level of engagement and interaction with generated social media content by reviewing comments and the number of likes and shares per post. In alphabetical order, the first company presented is Cotton On.

## 5.2.1 Cotton On

SECONDARY RESEARCH AND ANALYSIS OF SELECTED FASHION COMPANIES							
COTTON ON		DIGITAL STIMULI		VALUE PROPOSITION		THE ENVIRONMENT	
Fashion company	Retail channels	Website	social media	Company description	Target market	Company	Digital hedonic rhetoric
	Multi-channel	<a href="#">Link-SA</a>	<a href="#">Instagram – SA 548K followers</a> <a href="#">Twitter 34.3K followers – Australia</a> <a href="#">TikTok – Australia 217.7K followers</a> <a href="#">Facebook – SA 1m followers</a>				

### Target market

The identified target market for Cotton On includes individuals aged 18 to 35 (Lau 2015; Sheridan 2024). Cotton On does not give a distinct age range on its website, unlike other brands in the Cotton On business group. However, the business profile and description do allude to it being a youth-focused brand, as highlighted in the value proposition (Cotton On Group 2024). In addition, research on fashion companies from external sources confirmed the age range of their target market.

### Company Description

The company was founded in 1989 by Nigel Austin. The first store officially opened in 1991 in Geelong, Australia. Currently, the Cotton On Group has eight brands, which include Cotton On, Cotton On Kids, Cotton On Body, Factorie, Rubi, Typo, and Supre. Cotton On operates in 22 countries, with 1,500 stores and 171 stores in South Africa (Cotton On Group 2024).

### Value Proposition

The quotations below were collected from The Cotton on Group website and the 2023 Good Report (Cotton On 2023; Cotton On Group 2024). These resources are publicly available online and detail the business information of Cotton On.

The company's value proposition (Cotton On Group 2024) is best captured in the quotation, which states, *"We deliver the trends of the moment in womenswear, menswear and accessories, and inspire our community to have fun with it"*.

Cotton On further unpacks its succinct value proposition by stating how it interprets fashion trends for its consumers and the values that the company and brand embody (Cotton On Group 2024).

*"In touch with global trends, but not a literal interpretation. It's authentic, and we develop our ranges and prints in-house. It's effortless but aspirational. It's all about creating a product that reflects our unique, laid-back Aussie lifestyle and doesn't cost the earth. We know our responsibility goes far beyond just selling great product. So, from the way we build our global teams to the way we source and develop our product ranges, we make sure we're Doing Good every step of the way."*

### Environment and Digital Hedonic Rhetoric

- **Product:** The products that Cotton On sells include womenswear, menswear, and fashion accessories, including jewellery, eyewear, bags, belts, and shoes.
- **Place:** Cotton On is a multichannel retailer in South Africa with an e-commerce website and 171 physical stores.
- **Promotion:** The following social media accounts were accessed and analysed.

The local South African Instagram account of Cotton On was reviewed as secondary data. The Cotton On Instagram account prompts its followers to use a specific hashtag when users wear cotton to be featured on their Instagram page. In terms of user engagement, overall, the posts comprising user-generated content (UGC) have higher engagement than those advertising promotions or single fashion items. Posts that depict or portray current fashion styles available in stores at the moment also have higher engagement. Comments on these kinds of posts include followers wanting to find out more about the information communicated (location of the store, when certain collections will be released, etc.) Although there are no responses from Cotton On replying to these comments.


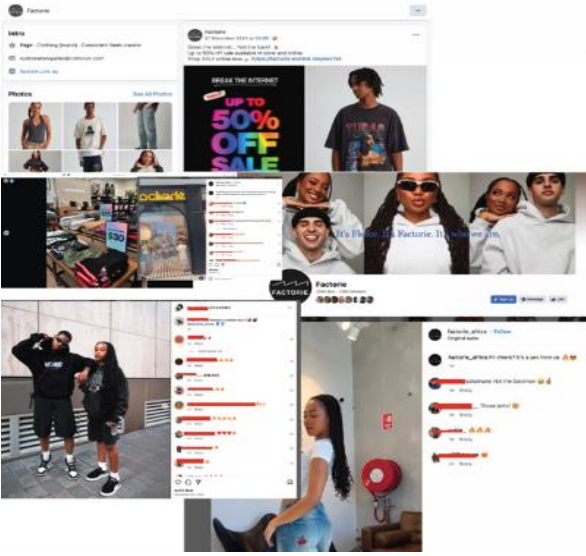
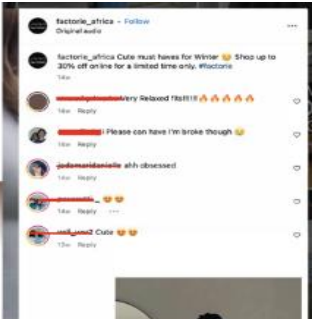


The Cotton On X (Twitter) page showcases their international collaborations and campaigns. The focus of these campaigns and the information communicated on Twitter is the brand's initiatives around wellness and its social impact. There is not much focus on fashion and the marketing of their products. The last post published on the international Cotton On X account was in September 2023 (reviewed by the researcher on 18 August 2024).

Similar to X, the Facebook Page of Cotton On, the last post published on this public page was in March 2023, reviewed by the researcher on 18 August 2024). The observation made when reviewing content from X and Facebook is whether these platforms are not popular with the target market of Cotton On. The Cotton On South Africa e-commerce website only includes its Instagram account for viewers or consumers to access.

The Cotton On TikTok account is an international account and caters mainly to its Australian consumer market. The same videos posted on the Cotton On Africa Instagram account are also posted on the TikTok account. The content creation collaborations are showcased on TikTok, which features Australian content creators, whereas the Cotton

On Africa account showcases their local collaborations and partnerships. It was also noticed that TikTok was the only page where Cotton On would interact or respond to viewers' comments on the content published on their page.

## 5.2.2 Factorie

SECONDARY RESEARCH AND ANALYSIS OF SELECTED FASHION COMPANIES							
FACTORIE		DIGITAL STIMULI		VALUE PROPOSITION		THE ENVIRONMENT	
Fashion company	Retail channels	Website	Social media	Company description	Target market	Company	Digital hedonic rhetoric
	Bricks and mortar	<a href="#">Link-- SA</a>	<a href="#">Instagram – AU 453K followers</a> <a href="#">Instagram SA 86.6 K followers</a>				
	E-commerce		<a href="#">Facebook – AU 334K followers</a>				
				<a href="#">Twitter – AU 4810K followers</a>			

### Target market

When reviewing the cotton on business group website, consumer reports and the Factorie LinkedIn page, there is no distinct age range offered. However, the company description alluded to the fashion company being youth-focused. In addition, the tone and language choice used on their website aligns to a youthful and young consumer segment: *“Factorie is a global youth fashion brand, where we remix the everyday to offer accessible street and casual fashion for girls and guys”* (Factorie LinkedIn, no date).

### Company description

The Factorie brand is a fashion company owned by the Cotton On Group since 2007. It was founded in Geelong, Australia. Factorie has grown internationally to over 170 stores across Australia, New Zealand, South Africa, Singapore, and Malaysia. Based on a search of the Factorie store locator web page, this research identified 34 Factorie stores in South Africa.

### Value proposition

The value proposition of Factorie is described as *“the go-to brand for youth street fashion”* (Cotton On Group 2024). The Factorie brand guarantees to offer its consumers fashion that expresses creativity by stating the following (Cotton On Group 2024:[sp]):

*“We’re all about creative expression through accessible fashion, youth culture and storytelling. We’re inspired by the skate and hip-hop culture of the ‘90s through colour and graphics that make our clothing and accessories stand out from the crowd. Our global community of customers are forward thinkers and challenge the norm, with a strong eye for style and street culture”.*

### Environment and Digital Hedonic Rhetoric

- **Product:** Factorie’s product offering includes menswear and womenswear and fashion accessories such as jewellery, eyewear, socks, bags, and belts.
- **Place:** Factorie is a multichannel retailer in South Africa with an e-commerce site and 34 physical stores around South Africa.
- **Promotion:** The Instagram accounts for Factorie in Australia and South Africa have a very similar style in image selection, promotional content, and how they visually communicate the product information (font style and positioning of text).




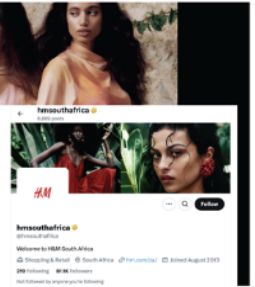
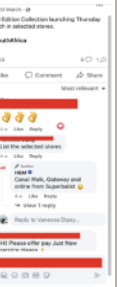
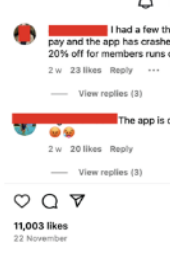



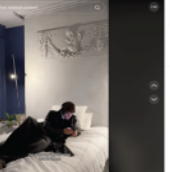


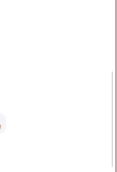
The images differ in demographics, where South Africa showcases models or South African consumers wearing or dressed in their clothes, and the Australian Instagram account caters to their majority demographic – this is evident in the images. The same business group owns Cotton On and Factorie. Consequently, their e-commerce website hosts both brands, similar to how Superbalist hosts H&M for their online shopping platform in South Africa.

When reviewing the South African Instagram account of Factorie, it was noticed that posts that collaborate with content creators gain the most likes and engagement in the comments and resharing or reposting among the followers of the Factorie Instagram account. These posts gained a minimum of 500 likes to almost 10,000 likes and a minimum of 20 to a maximum of 85 comments.

The posts created by Factorie with no collaboration or partnering with content creators gain as little as 80 likes to a maximum of 350 likes with little to no engagement in the comments section. The posts that announce giveaway competitions have high engagement but are not a constant or frequent occurrence on the Factorie South Africa Instagram account.

The TikTok account is also internationally run and based in Australia. When reviewing the TikTok account of Factorie, it was not possible to gauge or confirm if South African Gen Z consumers interact or engage on this platform. In the posts that were reviewed on the Factorie TikTok account, the comments per post mainly responded to what was shared in the post. The Factorie Facebook Page is also internationally run. The Facebook Page includes regular posts with information directing followers to the Factorie Australia website. There was little to no engagement in the comments, except for a post from September 2024. Although the Facebook account is international, South African consumers were noticed in the comments asking if the clothes advertised in the posts are available in South Africa. The number of likes on Facebook was less than 100 per post, which is considered to be low when compared to the high engagement on Factorie's other social media pages, such as Instagram and TikTok.

5.2.3 H&M

SECONDARY RESEARCH AND ANALYSIS OF SELECTED FASHION COMPANIES							
		DIGITAL STIMULI		VALUE PROPOSITION		THE ENVIRONMENT	
Fashion company	Retail channels	Website	Social media	Company description	Target market	Company	Digital hedonic rhetoric
	Bricks and mortar	<a href="#">Link— SA</a>	<a href="#">Instagram International</a> 38.4m followers				
	E-commerce		<a href="#">X (Twitter) – SA</a> 81K followers				
			<a href="#">TikTok – International</a> 418.6K followers				
			<a href="#">YouTube – International</a> 439K followers				
			<a href="#">Facebook – SA</a> 40m followers				

### Target market

The H&M target market, according to externally published sources, ranges from 18 to 35 (Edwards 2024; Ekren 2024). According to H&M as explicated on their website, they are a brand that caters to a diverse consumer cohort with no key distinction of an age range *“H&M offers a broad range of styles for different personalities, preferences, body types, ages, gender identities, occasions, and cultures”* (H&M–H&M Group, no date).

*“We are for everyone, but everyone is unique, which is why we always strive to have diverse teams. This also helps us to better understand our customers’ needs and perspectives, create relevant customer offerings and promote diversity, as well as contribute to a more inclusive world through our products and marketing.”*

### Company description

H&M is part of the H&M Group consisting of eight brands. The company was founded in 1947 in Sweden by Erling Persson. Hennes & Mauritz was introduced in 1968 after Hennes Retail acquired the Mauritz retail brand, which broadened the offering from womenswear to childrenswear and menswear. There are currently 3,814 H&M stores around the world. According to the South African H&M store locator web page, there are 28 stores in South Africa (*Store Locator South Africa | H&M ZA*, no date).

### Value proposition

The value guarantee promised by H&M to its consumers is described as *“a fashion brand, offering the latest styles and inspiration for all [...] Our aim is to make fashion and design accessible to everyone in a way that is good for people, the planet and our business”* (H&M–H&M Group, no date).

### Environment and Digital Hedonic Rhetoric

- **Product:** The product offering of H&M includes clothing, accessories, footwear, and cosmetics categorised under womenswear, menswear and childrenswear.
- **Place:** According to the H&M store locator web page, there are 28 stores in south Africa. H&M has an e-commerce outlet that is housed and run by Superbalist. When accessing the official South African H&M website, the online shop information refers to their storefront on Superbalist.

- **Promotion:** H&M has a combination of local social media platforms and international platforms. The local accounts such as X (Twitter) do not have high numbers of engagement, with an average of less than 10 likes per post with no comments and, on average, 400 to 550 views under each post with 0 to 5 likes per post on X. The posts share information on sales and new stock releases.

There is no resharing of UGC or consumers wearing items bought from H&M on the X account of H&M. Unlike retailers such as Cotton on, the X account is up to date with recent posts as recent as December 2024 (reviewed by the researcher on 11 December 2024).

The posts that have high engagement are the reposted X posts from consumers or content creators that have tagged H&M. The high engagement in these posts results from the content creator's original post and not from the X followers of H&M.

The Facebook Page is run in South Africa and shows the same images as X. These posts have more engagement in terms of users or followers of the page commenting on the posts. Some comments ask questions that H&M answers most of the time. On average, their posts receive 30 to 60 likes and 2 to 6 comments per post. Where possible, H&M engages with the comments. The posts average less than 100 likes, and the number of comments is also less than 5 per post (posts reviewed from December 2024 to May 2024 by the researcher). The engagement with comments is consistent. H&M responds to consumer queries in the comments section and informs the consumer if they sent a private message responding to any queries left in the post's comments section. Most comments are unrelated to the post under which the comment is left.

The H&M Instagram account is an internationally run account catering to European and American weather seasons. Currently promoting Fall/Winter collections as of November and December of 2024. There is engagement in the comments section of the posts published on Instagram consisting of a combination of followers commenting on the shopping experience, requesting assistance with refunds or returns or voicing complaints about service such as delivery of orders, the H&M app being down or socio-political protest or boycott messaging from followers (environmental sustainability issues). The overall aesthetic of the Instagram account is refined and sophisticated, with editorial-styled photographs posted as content. There is no record of H&M responding to followers'

comments, but the profile includes a message tab, which implies that they allow customers or followers to message them directly.

The H&M TikTok account is also internationally run, and there is a correlation with the content shared on Instagram. The content on TikTok is characterised as behind-the-scenes content from their campaigns and collaborations, whereas Instagram showcases the edited finalised campaigns. There is engagement with the followers who leave comments in the comments section of the videos or images posted.

The H&M YouTube account showcases a variety of videos, which are categorised according to campaign, collaboration, and conversational videos. The videos are categorised under various video playlists. H&M has turned off the comments for their videos. The only way followers or viewers can engage with the videos on the H&M YouTube account is by liking the video or resharing the video. The YouTube Shorts videos on the H&M YouTube account do not have as much engagement as the longer-length videos, which have over 9,000 likes and up to 40,000 views. The Shorts average around 120 views. The comments are also switched off.

### 5.2.4 Legit

SECONDARY RESEARCH AND ANALYSIS OF SELECTED FASHION COMPANIES							
		DIGITAL STIMULI		VALUE PROPOSITION		THE ENVIRONMENT	
Fashion company	Retail channels	Website	Social media	Company description	Target market	Company	Digital hedonic rhetoric
<b>LEGIT</b>	Bricks and mortar	<a href="#">Link</a>	<a href="#">Facebook</a> 890K followers				
	Online store		<a href="#">Instagram</a> 498K followers				
			<a href="#">TikTok</a> 32.6K followers				

### Target Market

The Legit target market is young women. The company does not offer a distinct age range. However, external resources describe the company as catering to the South African living standard measure (LSM) level between 6 and 10. An LSM between 6 and 10 (Ntloedibe & Ngqinani 2020; Yazzi 2020) can be described as South African consumers who have a High school and/or some higher education qualification that reside in mostly urban, rural, or suburban areas with a salary ranging from R4,000 to R32,500.

### Company Description

Legit is a South African clothing brand that has been owned by the Retailability business group since 2017. Other retail brands owned by this business group include Edgars, Keedo, and Boardmans. Legit has 249 stores located in 5 countries in Africa. According to the store locator web page, Legit has between 21 and 23 stores in South Africa.

### Value Proposition

The Legit value proposition is succinctly: *“Aspirational, Affordable, Authentic Ladies’ fashion”* (Retailability, 2025).

### Environment and Digital Hedonic Rhetoric

- **Product:** Legit’s product offering includes womenswear, shoes, beauty cosmetics, and fashion accessories such as jewellery, hats, bags, and eyewear.
- **Place:** In South Africa, there are 23 physical retail stores and an e-commerce website.
- **Promotion:** Overall, across Legit’s social media, there is consistent engagement levels with their followers. Legit’s website and social media do not provide detailed information confirming established influencer marketing initiatives, but followers can tag or use hashtags for potential features on the Legit social media channels.


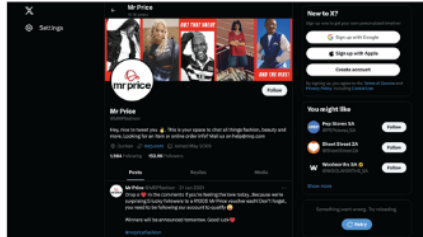


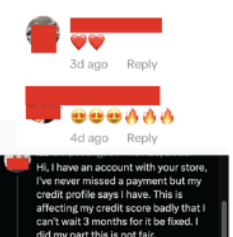

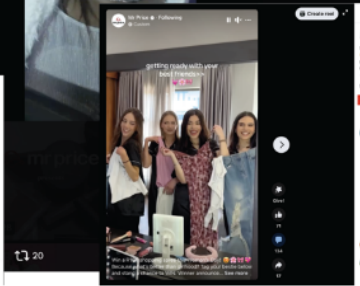
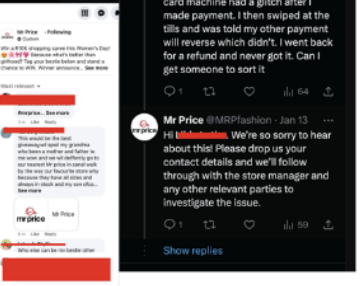
The Legit Facebook Page comprises frequent posts. There is engagement by way of likes, comments, and sharing. Legit consistently replies to comments from customers asking questions about the availability of stock and prices of items promoted in their posts.

The content posted on Instagram is the same as on Facebook; this may be due to both social media platforms being owned by Meta and allowing users to synchronise the content shared or posted on the various channels. Instagram showcases and publishes

the collaborated posts on their feed with content creators wearing or styling clothes from Legit. The Instagram page, similar to the Facebook Page, shows a record of consistent responses to consumer questions in the comments section of posts. The number of likes ranges from less than 100 to over 2,000 on Instagram. Based on the content, it is not confirmed if there is a preference for one type of content over another, but this may have to do with the time of day content is posted, which may result in high or low engagement.

The TikTok account has the same video content shared as Instagram and Facebook, as TikTok is primarily a video-based sharing platform. There were similar observations regarding engagement on all their social media platforms. The number of likes also varies, similar to Instagram. In addition to liking and commenting, reposting, or sharing posts, TikTok users can also save a post. Saving a post on TikTok ensures that the user engages with more content on TikTok from that specific account and similar content.

## 5.2.5 Mr Price Fashion

SECONDARY RESEARCH AND ANALYSIS OF SELECTED FASHION COMPANIES							
		DIGITAL STIMULI		VALUE PROPOSITION		THE ENVIRONMENT	
Fashion company	Retail channels	Website	Social media	Company description	Target market	Company	Digital hedonic rhetoric
	Bricks and mortar	<a href="#">Link-SA</a>	<a href="#">Instagram</a> 1.2m followers				
	E-commerce		<a href="#">X (Twitter)</a> 152.9K followers				
			<a href="#">Facebook</a> 2.3m followers				

### Target Market

Mr Price Fashion does not include an age range defining their target market but states that their customer positioning caters to “*youthful customers who love fashion, appreciate extraordinary value and are primarily in the middle-income demographic*” (Mr Price Group Limited 2024).

### Company Description

Mr Price Fashion is an omnichannel retailer established in 1985. Currently, Mr Price Fashion is one of the brands under the Mr Price Group Limited business division. Other brand divisions include Mr Price Sport, Mr Price Home, Studio 88, Sheet Street, and Miladys. Mr Price Fashion has 630 stores, and since 2021, they have offered the Mr Price Online e-commerce channel. Kantar Millward Brown Brandz rated Mr Price number one as the most valuable apparel fashion retailer in South Africa in 2023 (Shepter 2023).

### Value Proposition

The Mr Price Fashion brand promises “*surprising and delighting customers with the wanted item at great value and a satisfying all-round experience*”. Mr Price defines the value they guarantee as “*Value = Price + quality + fashion + convenience + experience*”.

Mr Price expands on its succinct value proposition by stating the following (Mr Price Group Limited 2024);

*“Mr Price is a fashion, leading clothing, footwear, cosmetics, and accessories retailer that offers on-trend and differentiated merchandise at extraordinary value to ladies, men and kids. Through constant innovation and product development, staying on the pulse of international fashion trends and diligent resourcing, we are able to make trend-led fashion accessible to customers at highly competitive prices.”*

### Environment and Digital Hedonic Rhetoric

- **Product:** Mr Price sells womenswear, menswear, and childrenswear, as well as beauty cosmetics, shoes, and fashion accessories, such as jewellery, eyewear, belts, and hats.

- **Place:** According to the Mr Price store locator web page, there are 668 Mr Price Fashion stores in South Africa. In addition to the physical stores, Mr Price has an e-commerce website, Mr Price Online.
- **Promotion:** Mr Price's (MRP) social media pages comprise Instagram, X, Facebook, TikTok, and YouTube. Mr Price's social media showcases customer-generated content as a form of marketing – the UGC consists of images and videos of MRP consumers dressed in MRP fashion products. The consumers would tag MRP to be featured on their social media. In addition to Mr Price Fashion prompting its consumers to use a hashtag to be featured on their social media, they also have information on their e-commerce website detailing how consumers who would like to model or become a Mr Price content creator for Mr Price can go about this (Mr Price 2024).

The Mr Price Fashion Instagram account consists of content created by Mr Price, collaboration posts with content creators and giveaway competition posts. The engagement in terms of likes and comments is consistently high. The number of Instagram followers is 1.5m followers. Mr Price does respond to consumers' or followers' comments. Some comments are related to the post, expressing their satisfaction with the content or clothing published. Other comments are related to followers asking if the items published on social media are available in specific stores. It was also noticed that Mr Price Fashion's consumers outside of South Africa also engage and follow Mr Price Fashion on Instagram.

The posting on Mr Price X's account is not as consistent and frequent as on Instagram. It was noticed that the last post was in November 2024, and this was a reposted X post. The content on X comprises a number of reposted content items that Mr Price reshares on its X account.

Overall, the same videos or content items are posted across Facebook, Tik Tok, and Instagram, but the level of engagement is highest on Instagram, followed by TikTok and then Facebook. Comments on Facebook are mainly made up of consumers asking for a price or customer service-related queries such as requesting information for the returns or refund processes.

On Mr Price's TikTok account, like Instagram, consumers engage with the retailer in the comments and by liking the videos posted. Consumers share their satisfaction with Mr Price and voice their complaints regarding customer dissatisfaction. Mr Price replies to these comments and requests that the consumer send them a private message so they can further assist. It was also noticed that when Mr Price responds to comments of followers or consumers expressing their satisfaction with the content, Mr Price takes on a very colloquial tone and responds using relevant slang words that their young consumer demographic can relate to. Terms such as 'bestie' or 'Purr' were noted in the comments section shared by Mr Price

5.2.6 Shein

SECONDARY RESEARCH AND ANALYSIS OF SELECTED FASHION COMPANIES							
		DIGITAL STIMULI		VALUE PROPOSITION		THE ENVIRONMENT	
Fashion company	Retail channels	Website	Social media	Company description	Target market	Company	Digital hedonic rhetoric
<b>SHEIN</b>	E-commerce	<a href="#">Link</a>	Facebook 31m followers				
		<a href="#">Link SA</a>	Instagram 32.1m followers				
			X (Twitter) 8142K followers				
			YouTube 689K followers				
			TikTok 9.2m followers				

### Target Market

The Shein business website does not define its customers in relation to a distinct target market description. Many external publications, including academic and commercial articles, discuss Shein and the company's marketing strategy. Sources consulted mention that Shein's primary target market is Gen Z (Li 2022; Huang 2024; Koutsou-Wehling 2024).

### Company Description

Shein is an e-commerce fashion retailer founded in 2012 in Singapore, where its headquarters are located. The Shein mobile app was launched in 2015. According to the Shein Business profile, *"Shein serves customers in 150+ countries from key operation centres worldwide, including the U.S., Brazil, Ireland, and Southern China. Shein has offices in Los Angeles, São Paulo, Dublin, Guangzhou, Paris, Washington DC, London, and Singapore"* (Shein 2024a).

### Value Proposition

The value guarantee that Shein aims to fulfil through its product (Shein 2024b):

*"...is to make the beauty of fashion accessible to all, reimagining fashion by leveraging our small-batch on-demand production model. This innovative, customer-driven model allows for more choice at more affordable prices while minimising waste by measuring customer preferences more accurately and efficiently".*

Shein's business model, as explained on their website, aims to ensure they are able to reproduce fashion trends that are current and in-season by paying close attention to customer preferences through social media as a crucial form of consumer market research.

### Environment and Digital Hedonic Rhetoric

- **Product:** Shein offers various fashion products, including womenswear, menswear, and children's wear. In addition to clothing, they sell fashion and jewellery accessories, shoes, and beauty cosmetics.
- **Place:** Shein retails online via their e-commerce website and mobile application. As Shein is an international retailer, they seem to have customised the webpage for

South African Shein customers. The consideration of customising the storefront includes payment options, including South African fintech portals such as Ozow. It was also noticed that the products displayed on the homepage of the South African webpage are in season with the South African weather season. When accessing the Shein website and selecting another country, the products on display and the language, if the primary language spoken is not English, are also updated.

- **Promotion:** In addition to Shein's international social media accounts, Shein has established South African social media accounts on TikTok and Instagram, which can be accessed via the South Africa Shein e-commerce site.

The international Instagram account is very active, and posts are shared frequently. The number of likes per post is high, and the level of engagement in the comments is also high. Shein does respond to consumer queries in the comments section. This observation was unexpected, as Shein's international Instagram posts have an average of 40 comments per post and over 15,000 likes per post. The more posts that were reviewed, the more it was noticed that the responses from Shein were generic and that they would reply with the same text response, depending on the query. Some of the queries related to requesting a price for an item included in the post or issues with shipping and delivery of a customer's order.

The South African Instagram account mainly showcases user-generated content of South African customers, whereas the international account showcases mainly company-generated content. Shein has multiple Instagram accounts for the various countries to which it retails. It was also noticed that the Shein South Africa Instagram accounts follow accounts such as Superbalist, Mr Price, Truworths, and Identity, all South African fashion brands and are seen as competitors for Shein in the South African fashion consumer market. There is no engagement with consumers who ask questions in the comments section of the Shein South Africa Instagram account, unlike the international account. It was also noticed in the posts that were reviewed that posts that include photos or videos of clothing receive more likes and engagement as opposed to non-clothing items.


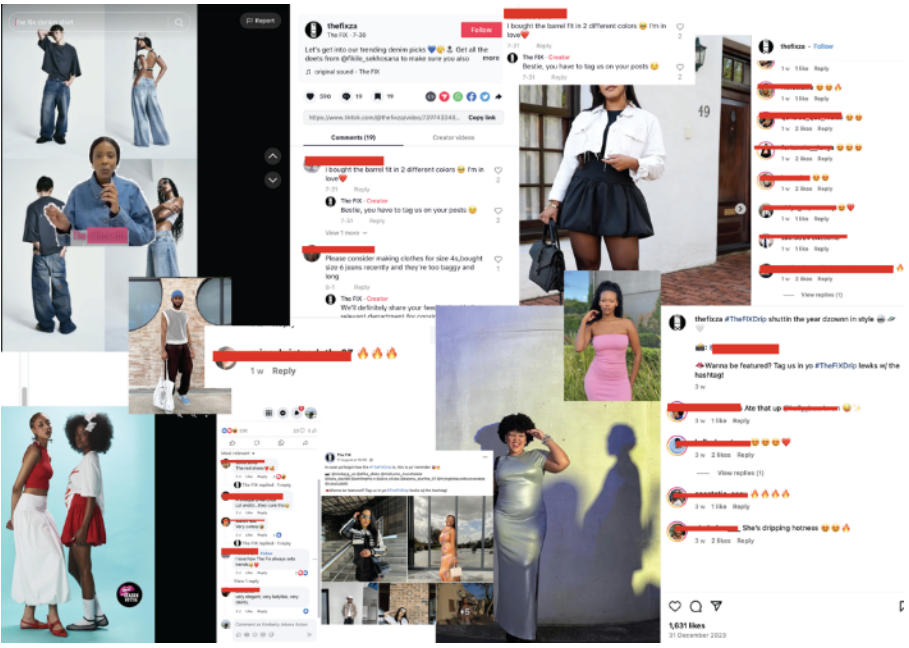
Two TikTok accounts were reviewed: the international and the South African TikTok accounts. It was noticed that the same videos posted on the respective Instagram accounts were also viewed and posted on the respective TikTok accounts. There has been no response to customer comments on the South African TikTok account or

Instagram. When customers ask questions about their orders and when to expect their delivery, other users and Shein customers reply to comments and share their experiences with what may be the intention to assist or offer insight. This is not the case for the international account, where Shein does reply to comments posted under the videos shared. Most of Shein's replies request that customers send private messages.

The Shein X account is titled Shein News, and it posts mainly public relations-based information on the Shein business and its business partnerships. The posting is not as frequent as on Instagram. The Shein X account does not share promotional content. The main focus is to share information related to the business's other portfolios or profiles and the business and the social and economic engagements they are part of: partnerships with other companies, designer incubation initiatives and apprenticeship initiatives.

The Shein YouTube channel showcases longer-length videos profiling fashion designers and customer shopping hauls. Each of these videos is categorised into playlists.

5.2.7 The Fix

SECONDARY RESEARCH AND ANALYSIS OF SELECTED FASHION COMPANIES							
		DIGITAL STIMULI		VALUE PROPOSITION		THE ENVIRONMENT	
Fashion company	Retail channels	Website	Social media	Company description	Target market	Company	Digital hedonic rhetoric
	Bricks and mortar	<a href="#">Link- SA</a>	<a href="#">Instagram</a> 796K followers				
	E-commerce		<a href="#">Twitter</a> 9469K followers				
			<a href="#">TikTok</a> 169.5K followers				
			<a href="#">Facebook</a> 713K followers				
			<a href="#">YouTube</a> 6.64K followers				

### Target Market

The Fix states that the age range of its target market is “women aged 18 to 25” (TFG 2024b).

### Company Description

**Description:** The Fix is a South African retailer owned by The Foschini Group (TFG) Africa as one of its fashion brand divisions. The company was previously known as Fashion Express when it launched in 2001, and the renaming and rebranding took place in 2015. There are currently 214 stores in South Africa (TFG 2024).

### Value Proposition

The Fix guarantees “Fast fashion at incredible value. The Fix is the destination for see-now, buy-now, wear-now fashion. Aligned to international fashion trends as they happen, fashion-forward customers look here to get their latest fashion fix”. (TFG 2024).

### Environment and Digital Hedonic Rhetoric

- **Product:** The products sold at The Fix include womenswear and menswear and fashion accessories such as jewellery, shoes, and beauty cosmetics.
- **Place:** The Fix is an omni-channel retailer with 214 physical stores in South Africa and an e-commerce website. The brand is part of The Foschini Group and is available online via Bash, TFG’s online e-commerce website and mobile shopping app. Consumers have the option of shopping for products from The Fix through the Bash website or by downloading the Bash app.
- **Promotion:** The Fix social media showcases customer-generated content as a form of marketing. The content consists of images and videos of The Fix consumers dressed in fashion products from The Fix. The consumers would tag The Fix to be featured on their social media. Consumers are also encouraged to tag The Fix by using the hashtag #TheFIXDrip. The posts that seem to have more interaction in likes and comments are the posts that share consumer or content creator’s content.

Instagram and TikTok have the same content or posts shared on their respective channels. Although the content on TikTok and Instagram are the same, the respective social media feeds do not look identical because the media formats on Instagram and TikTok are different. The same hashtag as Instagram for consumers to share images and or videos of them wearing clothing from The Fix is titled The Fix Drip. This is a frequently

themed post on TikTok's feed. It is worth noting the number of saved posts or the number of accounts or followers who have saved posts from The Fix TikTok. This affects the follower's algorithm to see more posts from this specific account on their For You Page (FYP).

The Fix engages with its social media followers in a relatable and casual tone of language that speaks to its main consumer demographic as if it is talking to someone it knows. This casual and colloquial tone in interacting with their customer is similar to the observation made of Mr Price Fashion. Some terms identified in The Fix's reply to followers or consumers include "Hey boo" "exactly bestie 🥰", "We are withiin 🤞🌞🤞🌞", and "IKDR" (acronym for I Know Dat's Right).


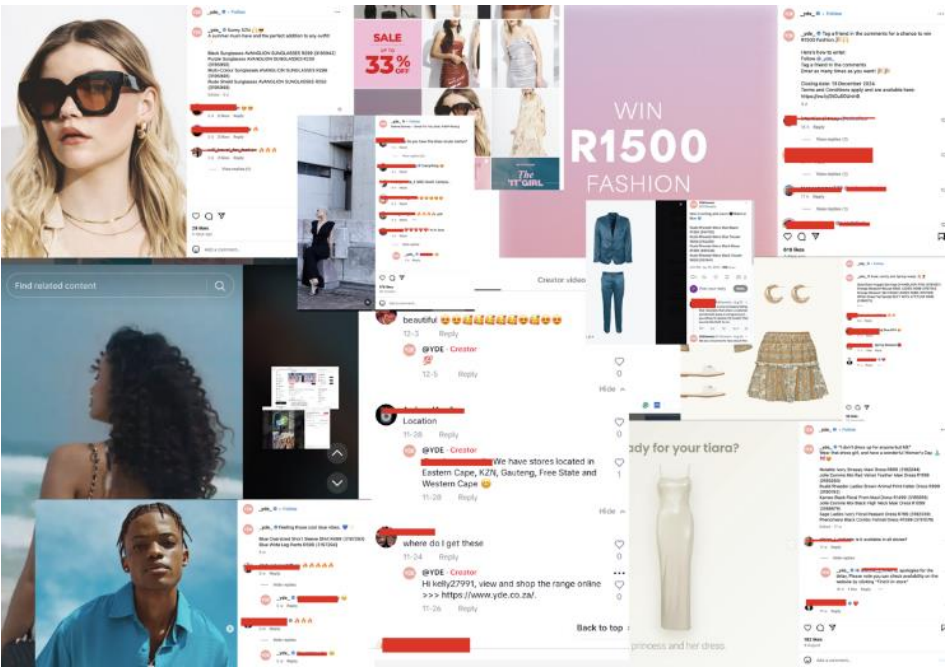
X showcases more of the promotional content and memes related to shopping at The Fix. There is not as much engagement on X. Engagement on posts for competition giveaways is the highest amongst their followers on X. Few posts have comments except for what was previously stated above. The Fix includes memes as part of their marketing content. It was noticed that any post that asks a question does get engagement. It is worth noting that there are retweets or shares on the posts, even if there are no comments or engagement in the comments section.

The videos posted on Facebook are the same as the videos on TikTok and Instagram. The Facebook Page of The Fix consists of frequently posted content. The level of engagement on Facebook is lower when comparing this platform to Instagram. There is not a high number of engagements in terms of comments, and the number of likes averages around 145 per post. Posts that include pictures of consumers or consumer-generated content have higher levels of engagement, with about 20 comments, 2200 likes, and 22 shares.

The YouTube account of The Fix comprises video content that is longer. These videos include content creator collaboration videos and try-on hauls. These also include videos from fashion buyers and designers who work at The Fix who share information on the new fashion trends that customers can expect. Lastly, campaign videos showcasing community development initiatives the company is a part of are also shared on the YouTube page. Collaborations with charity organisations and community outreach

initiatives such as Gender-based violence are presented in videos on YouTube. Shorter 60-second videos on YouTube consist mainly of promotional content videos.

5.2.8 YDE

SECONDARY RESEARCH AND ANALYSIS OF SELECTED FASHION COMPANIES							
		DIGITAL STIMULI		VALUE PROPOSITION		THE ENVIRONMENT	
Fashion company	Retail channels	Website	Social media	Company description	Target market	Company	Digital hedonic rhetoric
	Bricks and mortar	<a href="#">Link</a>	<a href="#">Instagram</a> 183K followers				
	E-commerce		<a href="#">X (Twitter)</a> 21.5K followers				
			<a href="#">TikTok</a> 22.3K followers  <a href="#">Facebook</a> 709K followers				

### Target Market

The target market of Young Designers Emporium (commonly referred to as YDE) is men and women between the age of 16 to 35 (Truworths International 2024).

### Company Description

YDE is part of the Truworths International business group and was founded in 2003. YDE currently has 19 stores in South Africa (Truworths International 2024).

The company's description states the following (YDE, no date):

*“At YDE we are all about local brands. South African designers creating unique pieces that mix the best of our culture with all the latest international catwalk trends. Our lineup of South African talent is handpicked for their individuality, creativity, and the stories they want to tell through their ranges. Each and every designer that forms part of our fold have their own sense of style, and that's why we are able to offer rails that are filled with every trend and every look you can imagine. YDE exists to showcase the creative talent of up-and-coming clothing, footwear, and accessory designers in South Africa.*

*We provide emerging designers with an established platform where they can exhibit and sell their bespoke merchandise. Our clothing and accessory ranges and brands are original, sexy, and expressive, and cater to a fresh and trendy customer-base who has a keen eye on local and international fashion trends”.*

### Value proposition

The value proposition of YDE is succinctly described as a brand that “ *showcases South Africa's young, cutting-edge fashion talent [...] Consumers of YDE can expect to shop local fashion products designed and made by young South African fashion designers*” (Truworths International 2024).

### Environment and Digital Hedonic Rhetoric

- **Product:** The products sold at YDE include womenswear and menswear and fashion accessories, such as jewellery, shoes, and beauty cosmetics.

- **Place:** YDE is an omnichannel retailer with 19 stores in South Africa and an e-Commerce website.
- **Promotion:** YDE has an active social media presence. The content shared on Facebook and Instagram is the same, and there seems to be more engagement with followers or consumers on Facebook who respond to questions posted in the comments section. However, across all the YDE social media, Instagram has the highest level of engagement from followers or consumers.

The YDE Instagram account posts a combination of professionally shot promotional content, which is more frequent than the other accounts. The number of likes on these posts is generally less than 100, and the comments range from 0 to about 33. The Instagram posts that share images of consumers dressed in YDE clothing receive more engagement as YDE tags or mentions the consumer or content creator. By posting these kinds of collaborative posts, the content creator can share the post with their followers, which garners more engagement in relation to the number of likes and comments.

It was also noticed that YDE includes clear and comprehensive product information such as price and product codes for easy access to the product for consumers interested in purchasing the product. As a result of this, there were not many comments that queried about price. However, when there are queries regarding confirmation of stock availability, YDE responds with comprehensive information for the follower asking the question. Giveaways or competition posts gained the most engagement on Instagram, where followers could win if they followed the competition instructions.





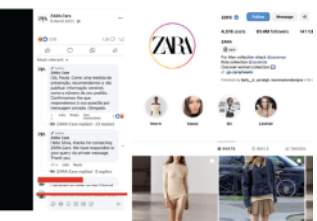
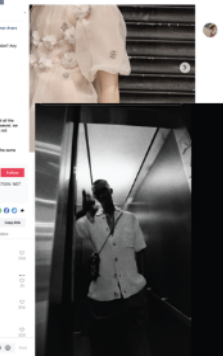
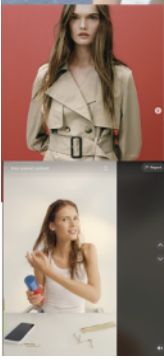
When reviewing the X account for YDE, it was noticed that the last post was shared or published on 25 April 2024 (reviewed by the researcher on 13 December 2024). Apart from this observation, there was not a high level of engagement, but it was still evident that YDE would respond to followers' comments left in posts published on X.

The engagement on TikTok is less than on Instagram in terms of the number of likes and comments. However, there is consistent response and engagement with followers in the comments section of Instagram, Facebook, and X. The number of viewers who saved videos or posts from YDE is also worth noting, as it will influence the follower or consumer algorithm to receive more videos from YDE or videos with similar content on their For You Page (FYP) on TikTok.

YDE prioritises sharing and posting digital fashion communication that promotes its evening and formal wear. Furthermore, YDE's focus on youthful formal wear is a good value proposition for young consumers looking for affordable formal or occasional wear, even though they also sell casual menswear and womenswear. They mainly market clothing categorised as formal wear on their social media.

YDE's response to queries is consistent throughout all their social media. They respond in the comments section of their posts and also request that consumers message them privately if the information is sensitive, such as order number details.

5.2.9 Zara

SECONDARY RESEARCH AND ANALYSIS OF SELECTED FASHION COMPANIES								
		DIGITAL STIMULI		VALUE PROPOSITION		THE ENVIRONMENT		
Fashion company	Retail channels	Website	Social media	Company description	Target market	Company	Digital hedonic rhetoric	
	Bricks and mortar	<a href="#">Link SA</a>	<a href="#">Instagram</a> 61.4m followers					
	E-commerce		<a href="#">Facebook</a> 315K followers					
			<a href="#">X (Twitter)</a> 81.7K Zara Care followers <a href="#">X Zara Official</a> 1.3M followers  <a href="#">Tik Tok</a> 10.2m followers					

### Target market

The business group website of Zara does not offer an age range when describing its target market. The following description was found when reviewing the Zara business website that speaks to its target consumer: “Zara’s designers respond instinctively to their changing needs, reacting to the latest trends and constant feedback to deliver new ideas for everyone in the right place and at the right moment” (Inditex, no date). External sources, including academic articles, define Zara’s target audience to cater mainly to Millennials and Gen Z or individuals aged between 20 and 35 (YDE, no date; H&M - H&M Group, no date; H&M’s Marketing Strategy: The Recipe to Fashion Retail Domination, no date; [2022] Mr Price Group Marketing Segmentation Targeting Differentiation Positioning Solution, no date; Bhasin, 2018; Baena, 2024; Cotton On Group, 2024a, 2024b; Shein, 2024a; TFG, 2024a; Retailability, 2025).

### Company description

Zara is an international fashion brand founded in 1975 and owned by the business group Inditex, which is based in Spain. They currently have seven stores in South Africa (Inditex, no date; Zara, no date).

### Value proposition

Zara as a brand is described as “a forward-thinking force in fashion, embodying what is possible when responsibility and aspiration are accessible to all”. Their value proposition promises to offer “thoughtful style to the world, we aim to provide everyone, no matter where they are, with the inspiringly beautiful, always on-trend, responsibly crafted fashion they deserve” (Inditex, no date).

### Environment and Digital Hedonic Rhetoric

- **Product:** The fashion products that Zara retails include menswear, womenswear, and childrenswear. Zara also retails a variety of fashion accessories, such as jewellery, eyewear, shoes, and cosmetics.
- **Place:** In South Africa, Zara has seven physical stores across Gauteng, KwaZulu-Natal, and the Western Cape. In addition to the physical stores, Zara has an e-commerce site for South African consumers.
- **Promotion:** The brand focuses mainly on company-created content across all the reviewed Zara social media accounts. The content can be visually characterised as a minimal aesthetic with neutral colours. Although Zara caters to a South African-

based consumer market, its social media portrays the international Zara brand with no local component or separate South African social media divisions. The comments across the reviewed Zara social media were negative comments pertaining to bad customer experiences with online purchases and returns and refunds.

It was noticed that the X and Facebook accounts are used for customer care-related queries. As a result, these social media pages are named Zara Care. There is no posting of promotional content on their Facebook Page, but customers leave comments detailing their queries by commenting on pictures posted under Zara Care (images such as cover photos, etc.). There are also no clear instructions on how to leave a query, but there is a message button, and it is often suggested that the customer would rather send a message detailing their query as opposed to posting in the comments section of a posted image on the page where the customer's personal information cannot be protected.

Although the X account is also designated for Zara customer care, their last post was on 15 January 2018 (reviewed by the researcher on 18 August 2024). In addition to the Zara Care account, there is a Zara official X account where promotional content is shared. However, the last post on this X account was on 21 May 2024 (data collected on 18 August 2024). Zara states in its description that customers can refer any customer care queries to their Zara Care X account. However, consumers still share their customer queries on this Zara account, and Zara does respond to assist.

The Zara Instagram account is international, and it is not specific to a country. Therefore, the use of language varies from English to other languages, such as Spanish, German, and Turkish. Most of the comments under each post on Instagram detail shopping experiences, which are mostly negative. The comments also include customer queries on clothes included in their posts. Zara does respond to these comments. It was also noticed that when Zara does respond to comments, whatever language the comments are posted in, Zara responds in that same language. Instagram has a built-in function for text translation, making it possible for the researcher to translate the comments that were not in English. In comparison to the other eight fashion company's social media, there was minimal use of emojis in comments from consumers. The majority of consumers leave comments pertaining to requesting information about product availability in their specific location. Other comments detail boycotting Zara for political reasons.

The last social media account of Zara that was reviewed was TikTok. It was observed that influencer or content creator collaborations are more present on their TikTok page. However, the content that was predominant on TikTok was a showcase of mainly Zara beauty or makeup products rather than clothing, although content promoting clothing was reviewed. TikTok's engagement is more positive overall than that of Facebook, X, and Instagram. It was noticed that emojis were used more on Zara's TikTok account. No customer complaints were reviewed or noticed on TikTok. It was noticed that there were comments critiquing the high prices of Zara South Africa. These comments were noticed twice across the posts that were reviewed. Similar to Instagram, there were boycott-related comments in earlier posts of February 2024 related to the Israel and Palestine conflict and genocide.

Although Zara's social media accounts are all internationally run, there is a correlation between promotional content on Instagram showcasing new collections and what is currently for sale on the South African Zara website.

The discussion of findings collected and analysed from the secondary data of all nine fashion companies presented some patterns and similarities in the application of social media platforms or identification of their target market. The discussion below summarises the patterns and similarities identified in analysing the secondary data of all nine companies. Under the sub-headings used for each company, the summary concludes the discussion of findings of the first phase of data collection.

### **5.3 PHASE ONE OVERVIEW**

The discussion of findings pertaining to phase one concludes with an overview of all nine fashion companies. The overview details the patterns and similarities in the data relating to the target market, company description, value proposition, environment and digital hedonic rhetoric.

#### **5.3.1 Target Market**

It was noticed that most international fashion companies, such as Cotton On, H&M, and Shein, do not give distinct target market categorisations such as age. However, these retailers use terms that allude to their target market: young consumers. Sources such as academic articles and consumer reports further confirmed the target market of Gen Z

consumers, as detailed in the respective sections of phase one. South African fashion companies such as Mr Price, The Fix, and YDE offered distinct categorisations of their target market, all consisting of Gen Z consumers and older generations.

### **5.3.2 Company Description**

The fashion companies detail the origins and current operational set-up of the fashion brands and the business groups that own the brands or companies. All fashion companies detail their company or brand's mission and aims. The sourcing of this information required data collection beyond the company's online or e-commerce website, as this information was not consistently published on the company's site. The information included in the company descriptions was sourced from the business group or corporate websites. The corporate website provides information about the organisation's overall operations, leadership, mission, investor relations, and career opportunities to the public, including potential investors, partners, and media, rather than just customers directly buying products or services (RGB 2023). Confirmation of the number of retail stores each fashion company has within South Africa was sourced through the e-commerce sites of the respective companies.

### **5.3.3 Value Proposition**

The fashion company's value guarantee or promise to its consumers prioritised the balance between product quality based on current trends and affordability. Other key terms or concepts that most of the international companies emphasised were their promise to instil sustainable fashion practices, fair labour practices among the employees, and diversity. Although these were concepts outlined in their value proposition, the comments section of companies, namely Zara and H&M, consisted of social media users challenging their claims to be environmentally sustainable or calls to boycott these brands due to socio-political current affairs. Companies that had presented a correlation or consistency between their communicated value proposition and the consumer's perception of the value proposition included The Fix, Factorie, and Legit. This observation was made through the analysis of the comments sections of the various social media platforms that were reviewed.

### **5.3.4 Environment and Digital Hedonic Rhetoric**

Where products are concerned, all nine fashion companies sell fashion products, which include cosmetics and accessories in addition to clothing and shoes. All nine fashion companies are omnichannel retailers operating in physical stores and online through an e-commerce site. Companies all had active and consistent posts on their Instagram and TikTok accounts. Where content posting, interaction and engagement were not consistent was on Twitter and Facebook. Some of the fashion companies, such as Cotton On, had public and active Facebook Pages but had not posted in over a year. Confirmation of these public social media accounts that were no longer in use was also consistent with the corresponding e-commerce websites not promoting these social media pages.

## **5.4 PHASE 2: DISCUSSION OF THE GEN Z CONSUMER SURVEY**

This section details the second data collection phase, which comprised creating and distributing an anonymous online fashion survey. The survey was created on SurveyJS, an open-source survey software. The survey consisted of 29 questions consisting of multiple-choice, Boolean, and ranking options for answers, as well as short and long text responses. The survey was distributed through social media and broadcast emails. A survey poster and the survey URL were shared.

The study applied a snowballing purposive sampling method to distribute the survey among South African individuals aged between 18 and 28. There were 153 responses between October and December 2024. Table 5.3 includes the total number of responses categorised according to each respondent's age. Most (85%) of the responses were submitted by Gen Z individuals. Few (5%) were submitted by 29-year-old individuals. Research identifies this cohort of individuals as Zillennials. A Zillennial or Zennial are described as a micro-generation on the cusp of Gen Z and at the end of the Millennial or Gen Y generations (Napoli 2020). Responses from Millennials aged between 30 and 39 made up a small number (10%) of the responses received.

Table 5.3 is colour-coded. Green represents Gen Z, the study's intended sample. Orange represents the respondents aged between 29 and 35, who are made up of Zillennials and the younger Millennial cohort. The age range coded in red represents older Millennials who have a wider age gap than the Gen Z sample of this study.

**Table 5.3: Number of Survey Responses Received Grouped According to Age**

AGE	NUMBER OF RESPONSES	PERCENTAGE
18 to 28	131/153	86%
29	7/153	5%
30 to 35	11/153	7%
36 to 39	5/153	3%

As the employed sampling methods included snowballing, the survey responses included anonymous responses from participants older than 28. The majority of responses comprise Gen Z respondents; however, all the responses are analysed and discussed in this section. The reason for this approach is that this study acknowledges the value of analysing the small number (14%) of responses as the study alludes to the generations that precede Gen Z and the distinctions between these generations based on previous studies. This analysis furthermore offers findings on the distinctions between the generational cohorts and similarities in relation to fashion consumer and digital communication preferences.

The first phase of data collection had to be compiled before designing the survey, as the findings informed the survey questions of the secondary data and the nine fashion companies. In addition to the secondary data findings informing the survey questions, the study's conceptual framework guided the survey design and the questions. Subsequent to this, the discussion of the survey findings was categorised into five themes colour-coded according to the conceptual framework's categorisation. The five main themes that fall under these include digital stimuli, value proposition, and retail environment.

A key observation that informed the design of some of the questions in the fashion consumer survey was the frequent use of emojis or emoticons to express consumer satisfaction or dissatisfaction. This observation was consistent throughout the comments sections of all nine fashion companies' social media accounts. Figure 5.3 portrays an example of the most frequently used emojis to express satisfaction and dissatisfaction and how they were applied to the survey questions. Figure 5.4 portrays the application of emojis to represent satisfaction for various consumer factors that influence their fashion purchasing decision, such as product value, pricing, and marketing methods.

Please select your level of satisfaction for each listed retailer by ticking/  
selecting the appropriate row/ emoji.

🔥🔥😍 = Very satisfied | ❤️❤️👍 = Satisfied | 😐😐 = Neither satisfied nor  
unsatisfied | ❌🚫 = Not satisfied

**Figure 5.3: Survey Question Key Ranking Consumer Satisfaction Levels**

Please select your level of satisfaction for each listed retailer by selecting the  
appropriate row/ emoji.

🛍️👕 = Value of the products sold | 💰 = Affordable prices | 📱 = Relevant digital  
marketing (promotional) content |

**Figure 5.4: Survey Question Key Ranking Consumer Opinions on Fashion  
Product, Promotion, and Price**

As explained in section 5.1, the remainder of this section will be discussed using the  
following five identified themes.

1. Social media usage and engagement
  - Presence on social media and accounts
  - Level of social media activity is very active (time-based frequency), somewhat active, rarely active
  - Preferred and least-used social media platforms
  - Reasons for social media usage preferences
2. Fashion shopping habits
  - Frequency option of shopping for clothes ranges from twice a month to once a year or "other" (with explanation)
  - Shopping methods include physical stores, online, or a combination
  - Specific shopping behaviours (e.g., browsing online but purchasing in-store)
  - Clothing brands shopped include the nine fashion companies and other frequently shopped brands
3. Brand interaction and influence (Gen Z digital *fashion* hedonic rhetoric)
  - Fashion brands followed on social media
  - Engagement with specific brands or additional ones not listed.
  - Reliance on social media influencers/content creators
  - Use of influencer content for fashion advice or recommendations.

4. Factors influencing purchasing decisions (environment)
  - Engagement with fashion content is measured as a percentage of social media content consumed related to fashion and style
  - Determinants of choice include price, promotions, availability, style, trends, brand reputation, sustainability, reviews, or "other" (with explanation)
  - Marketing communication preferences include ways of receiving information (e.g., email, social media ads, influencer collaborations)
  - Digital fashion media methods are ranked preferences for videos, images, polls, giveaways, etc.
5. Customer experience and feedback impacting brand loyalty
  - Satisfaction with retailers' digital marketing content is a rating satisfaction for specific brands using emoji-based scales.
  - Brand loyalty to brands is determined by the frequency of shopping and engagement
  - Areas for improvement are collected suggestions for retailers (product value, pricing, marketing content, or all)
  - Factors influencing one's purchasing decision (price, product, promotional content).

## **5.5 PRESENCE ON SOCIAL MEDIA AND THE PREFERENCES FOR THE MOST AND LEAST PREFERRED SOCIAL MEDIA CHANNELS**

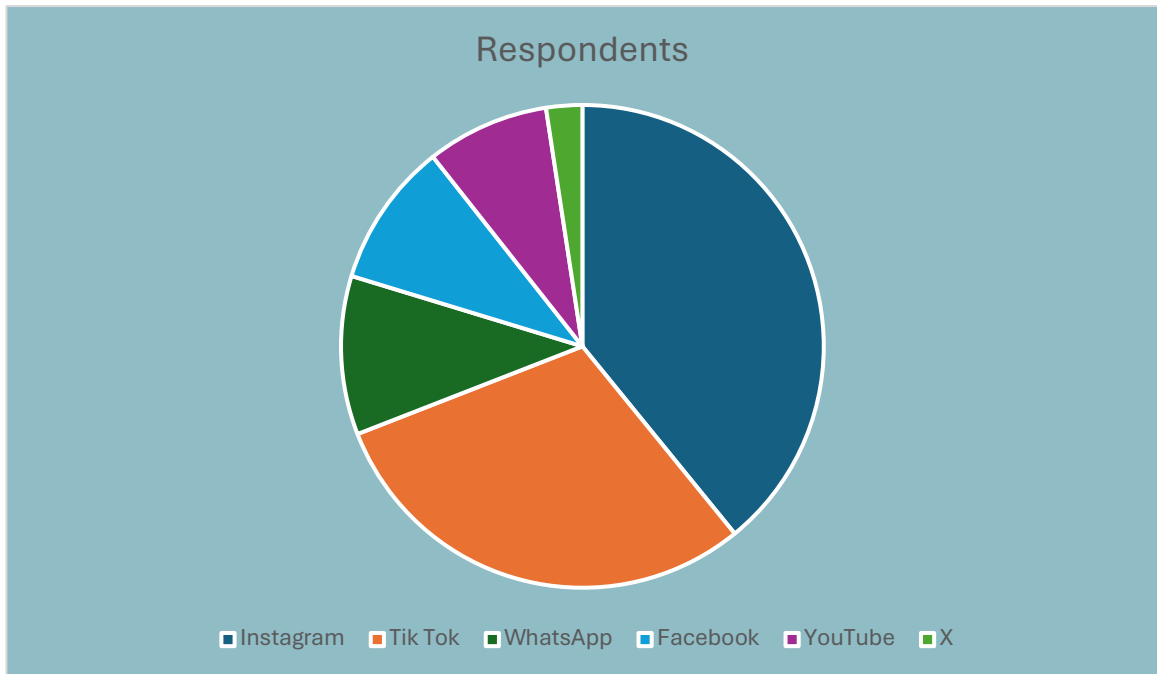
Almost all (98%) of the respondents stated that they have social media accounts. The 3 who stated that they did not have any social media all fall within the age range of Gen Z between the ages of 22 and 27. However, they further contextualised that they are “*on social media but rarely active (once a week or less)*”. The survey responses showed that most (81%) are very active on social media, with 83 respondents (54%) stating they spend more than three hours on social media per day. Less than half of the percentage previously mentioned (81%) is attributed to 41 responses stating that they spend up to three hours or less on social media daily.

The respondents engage with a variety of social media channels. Instagram is the most popular social media channel, followed by TikTok, WhatsApp, Facebook, YouTube and X, formerly known as Twitter.

The responses explaining social media preferences were influenced by several factors that meet personal, social, and professional user needs. Instagram was most preferred as it allows users to communicate and share content with friends, and most respondents mentioned that their friends mainly use Instagram. Only 1 highlighted how Instagram is *“more relevant, relatable and up to date with fashion trends and more of like a digital magazine”*. The overall diverse information and entertainment offered on Instagram appealed to the respondents, and most of their peers are also accessible on Instagram.

Many respondents value platforms like YouTube and TikTok for their diverse and tailored content. Similarly, Instagram and Pinterest are popular for their ability to provide niche content in areas such as fashion and art, making them appealing to users seeking specific themes. Beyond content variety, social connection plays a significant role in social media platform preference. Platforms like Facebook, Instagram, and WhatsApp are commonly used to maintain relationships with friends and family.

Efficiency and accessibility are also important factors influencing social media platform preferences. Instagram, TikTok, and WhatsApp were the top three preferred social media platforms, and their user interface was one of the positive benefits. Facebook was preferred for its low data usage, making it a convenient choice for many. There was one response that stated that, *“you can use Facebook without data”*. There were 20 who mentioned they preferred Facebook, and their ages were between 18 and 28, three were aged 29, and the other three who preferred Facebook were between 30 and 35. Figure 5.5 offers a visual overview of the most preferred social media platforms among the 153 survey respondents.



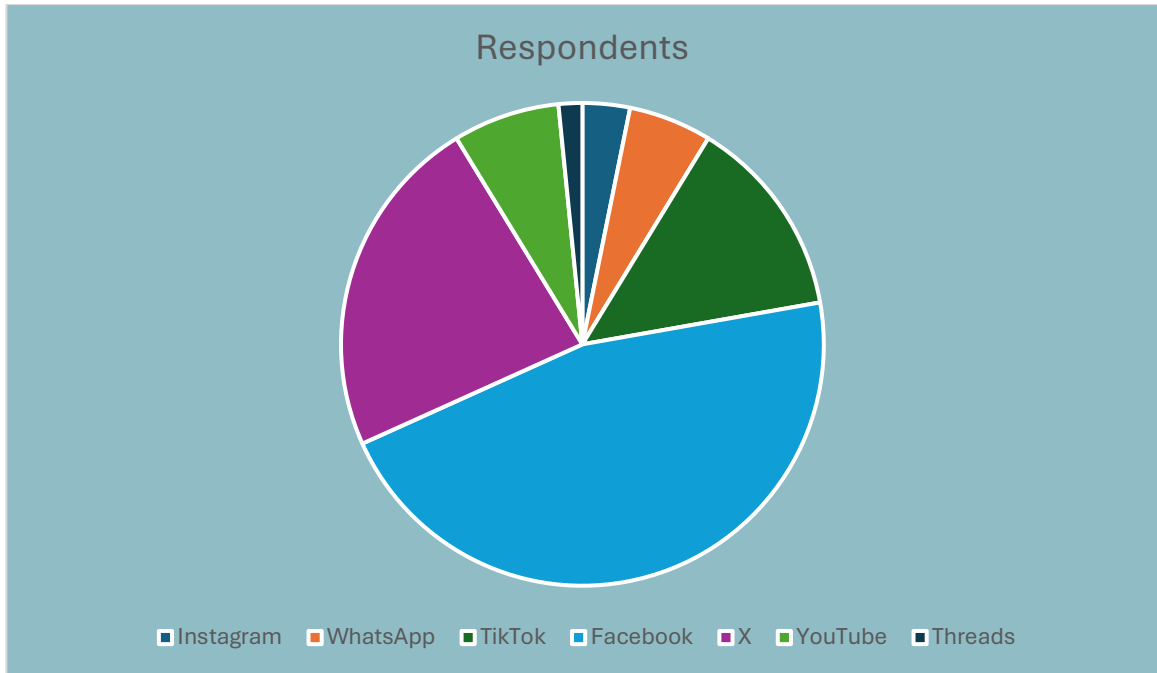
**Figure 5.5: Most Preferred Social Media**

For entertainment and relaxation, TikTok was most favoured with its engaging short videos, while YouTube offers a mix of short and long-form content that caters to leisure activities. In addition to entertainment, users appreciate platforms like TikTok, YouTube, and Pinterest for their educational and informative value, often using these channels as practical tools for learning and skill-building.

For those with professional and creative interests, platforms such as Instagram, LinkedIn, and Facebook are valued for their networking opportunities. These platforms enable users to showcase their work, build personal brands, and connect within specific industries. Finally, the customisation features and algorithms of platforms like TikTok, X, and Instagram were frequently mentioned as important to the respondents. These algorithms deliver content tailored to users' preferences, making their engagement with the platform feel more relevant and enjoyable. Overall, social media preferences are shaped by various factors, including entertainment, education, connectivity, and professional use.

The social media platforms that were least preferred (see Figure 5.6) and the reasons provided highlight that Facebook is least preferred amongst Gen Z respondents, with 48 of the responses describing Facebook as outdated. One of the responses stated,

*“Facebook feels a bit outdated regarding pace and interactivity”*. Another common sentiment among the responses related to Facebook was that most Gen Z respondents do not have friends who use Facebook. There were also thoughts shared about safety and lack of community on Facebook, such as negative comments or the fact that the information shared on Facebook is not always trustworthy.



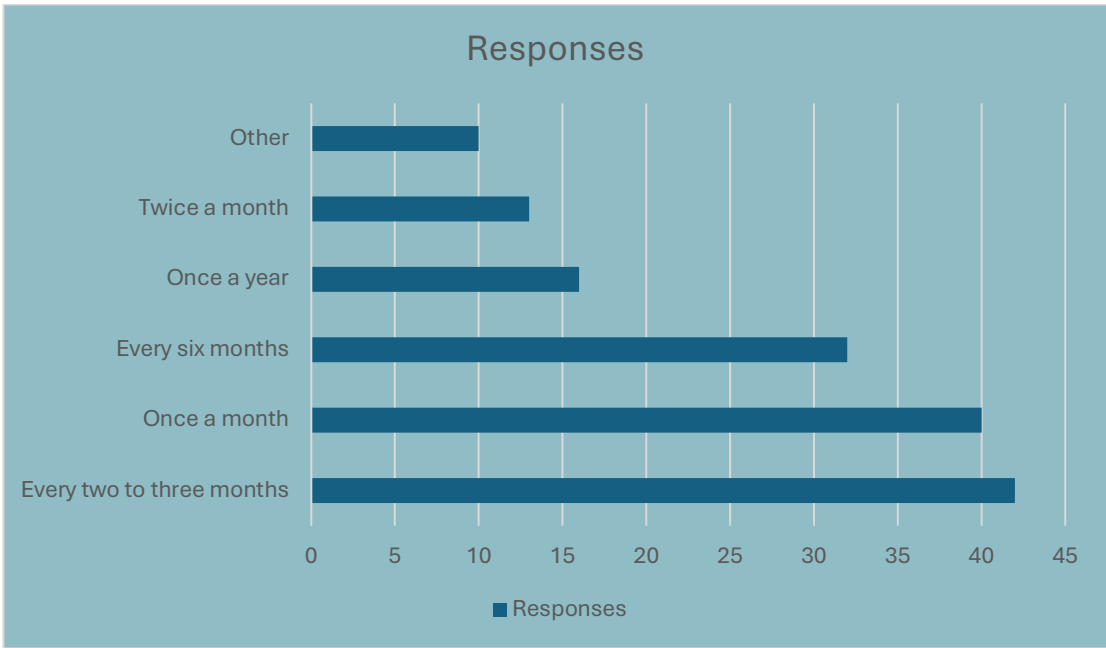
**Figure 5.6: Least Preferred Social Media**

Like Facebook, X was also cited as a social media platform that does not have relevant content, and both platform’s user interfaces were another reason for less interaction and engagement. The responses that asked which social media channel is the least preferred further confirmed that Instagram is the most preferred social media platform among the Gen Z respondents. Only 4 Gen Z respondents stated that they prefer Instagram the least, and the reasons mainly alluded to the information shared on Instagram being neither relevant nor insightful.

### **5.5.1 Fashion Shopping Habits**

The respondents were asked if they shop for their own fashion products: Almost all (99%) stated that they do, and only 2 answered “no” to this close-ended question. The frequency of shopping for fashion clothing revealed that 42 shop for fashion items every 2 to 3

months, followed by 40 who shop once a month. There were 32 who stated that they shop every 6 months for fashion products. Less than 20 stated that they either shop once a year or twice a month. The 10 who stated “other” further elaborated and explained that they shop based on a needs basis, which was not categorised according to frequency. Another reason that was given was linked to affordability. One of the responses stated, “I shop for fashion things occasionally or when I have money for them. I prioritise my needs more than fashion things” and another said, “every time I can afford to buy”. Figure 5.7 presents the 153 responses to the question asking how frequently they shop for fashion products.



**Figure 5.7: Frequency with which the Respondents Shop for Fashion Products**

When it comes to the method of shopping, 114 stated that they shop online and in the physical store for fashion products, 38 stated that they only shop in the physical store, and 5 stated that they only shop online. Of the five who only shop online, 2 were Gen Z respondents, and 3 were between the ages of 29 and 35. Of the 38 who only shop for fashion products at the physical store, 31 were Gen Z. This observation shows that it is mostly the younger who only shop for fashion items at the physical store, whereas the respondents between 31 and 39 prefer the convenience of shopping online and in physical stores. This observation also supports research exploring Millennial consumer behaviour and the convenience of online shopping (PWC 2023; Bucholz 2024).

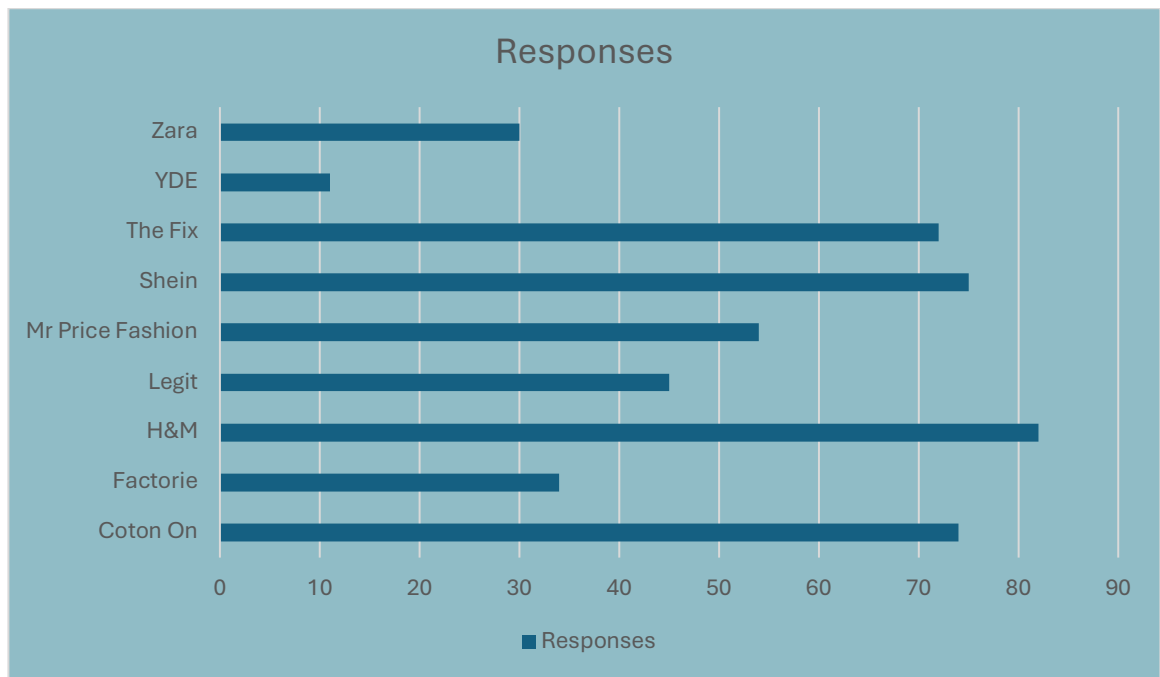
The survey questions that explored the respondents' consumer behaviour aimed to understand the shopping process from how and what informs the consumers' purchasing decisions. Of the 153 respondents, 92 stated that their shopping process begins by searching for products or styles through online channels such as social media or the online store of a retailer, and they then visit a physical store to purchase the item viewed online. There were 61 who searched for products and styles via the online store or social media page of the retailer and then would purchase the item online. There was an option for respondents to select if both of these shopping processes were relevant, and 16 could relate to both. Of the 153, 22 selected "*other*" and explained further that their shopping process also includes window shopping when visiting shopping malls. All the responses that were provided by the respondents who gave further explanation can be reviewed in Table 5.3. All the responses included in the survey are listed below verbatim, offering elaboration on their shopping process. Some of the responses included "*N/A*", which was not considered as further explanation given. Other responses were interpreted as similar to the options provided, such as doing research or searching for fashion products online and purchasing at a physical store. The colours green, orange, and red represent the age range, as explained in Table 5.3.

**Table 5.4: Respondents Further Explaining their Shopping Experience**

If you selected "other" for question 20, please explain further	
1.	I shop online and onsite but prefer to shop onsite
2.	If the shop is nearby, i purchase in-store, And if not I purchase online.
3.	I go into shops and browse to see if I like anything. If I use online shopping I will search for specific things.
4.	I look for style inspiration online and shop at both online/physical stores
5.	If I am in need of a piece, i go to nearest shopping center and browse a couple of stores to find something that tics my boxes
6.	I don't browse or do anything
7.	I mainly walk around through malls looking for items of a particular style
8.	I go to the shop and if I find something I like I'll buy it and if I don't find anything I'll leave empty handed
9.	I usually just go to physical stores and try on the items that I like.
10.	Sometimes I go window shopping at the physical stores even if i don't have money just to know what to buy the next time
11.	I generally have a style or vibe I stick to, and tend to buy things in pieces, i.e. A skirt or a shirt, that I know will pair up with something I already have
12.	N/A
13.	I mostly buy clothing from the physical stores
14.	I just look around the stores and try the stuff I like on similar to a fashion montage
15.	I buy what's available in the physical store
16.	N/A
17.	It changes. I sometimes research online buy online, sometimes just go into the store, sometimes research online buy in store.
18.	Sometimes I browse online and buy, and some other time I go to the physical stores to check what's available and also buy
19.	N/W (N/A)

20. I just shop what I see and like instantly. Some sales they don't put in the websites you only see the specials when you are at the store
21. I find an item I want for an outfit, see if my preferred brands have them online, and purchase in store to make sure they suit me and fit well
22. Search in a physical store
23. I do like to go to the physical store to check fit and quality sometimes if I am unsure or haven't seen reviews or if the images and product description is not clear online
24. I don't do research. I see it online or at the shop, I buy.
25. I browse online and also go to the physical stores
26. I check and buy online and also at the physical stores

Based on the survey results, all of the nine fashion companies selected as this study's subjects are familiar and known to the respondents. Figure 5.7 shows all nine fashion companies and the number of respondents that shop at each retailer. The retailer that was selected the most by 82 was H&M, followed by 75 stating they shop from the Shein international online retailer. Then, Cotton On with 74 and The Fix with 72. Mr Price was mentioned by 54, Legit by 45, Factorie by 34, and Zara by 30. Lastly, YDE was mentioned by 11.



**Figure 5.8: Number of Respondents that Shop at the Nine Fashion Companies**

In addition to the nine fashion companies, the survey asked respondents to mention if there were any other retailers from which they frequently shopped. There were 14 who stated they thrift shop for second-hand clothing, and another 14 mentioned Woolworths clothing. Other retailers mentioned by less than 10 each included Pick n Pay Clothing, Sportscene, and Markhams.

### 5.5.2 Brand interaction and influence (Gen Z digital hedonic rhetoric)

The nine fashion companies were analysed in the first phase of data collection. In this second phase, the survey confirmed whether the respondents interacted with or followed any retailers. Based on the number of responses, it is evident that consumers do not

follow all the retailers that they shop from on social media. Table 5.4 presents a comparison of how many respondents engage with fashion companies on social media and how many respondents shop from each of the nine companies. While reviewing the responses in detail, it was noticed that some mentioned that they do not shop from any of the nine fashion companies that this study is exploring. Only two respondents stated that they do not shop at any of the nine fashion companies explored in this study, as presented in Table 5.4.

**Table 5.5: Comparison of how many respondents engage with fashion companies on social media and how many respondents shop from each of the nine companies**

<b>Fashion company</b>	<b>Number of respondents following the retailer on social media</b>	<b>Number of respondents that shop from the nine fashion companies</b>
Cotton On	58	74
Factorie	16	34
H&M	45	82
Legit	19	45
Mr Price	15	54
Shein	56	75
The Fix	51	72
YDE	10	11
Zara	31	30
None of the above	6	2

In addition to the nine fashion companies, the brands or fashion retailers that the respondents mentioned that they follow included local South African fashion brands and boutiques, as well as retailers such as Superbalist, Foschini, and Woolworths. In addition, less than ten of the respondents mentioned that they follow brands such as Adidas, Nike, Prada, and Steve Madden.

The reliance on social media for Gen Z individuals is a key aspect of how this generational cohort maintains connection. This interaction and engagement with social media are achieved in various ways. When it came to exploring the respondent’s reliance on social media content creators or influencers for style and fashion reviews or suggestions, 100

said that they do not rely on content creators for this information, and 53 said that they do.

### 5.5.3 Factors Influencing Purchasing Decisions (environment)

To further explore the respondent’s level of engagement with digital fashion communication methods, one of the survey questions required them to rank fashion marketing methods from the most preferred, ranked first, to their least preferred, ranked last. The ranking included the following four digital fashion communication methods: email subscriptions, following a fashion retailer’s social media pages, sponsored social media advertising, and influencer/ content creator marketing collaborations. When analysing the responses to this question, the study derived a colour-coding system to identify the most prominent ranking order or pattern. Table 5.5 presents the ranking order for each marketing method, emphasising how many times each marketing method was ranked first, as the most preferred, second, third and fourth, as the least preferred. In addition, Table 5.5 includes colour coding for the ranking of responses from the survey.

**Table 5.6: A tally of the Ranking Order for Marketing Methods**

RANKING		1st	2nd	3rd	4th
COLOUR	YELLOW	5	5	3	4
	PINK	6	3	4	3
	TURQUOISE	6	4	3	4
	GREEN	1	5	6	6

Table 5.5 shows that most respondents prefer following fashion retailers’ social media pages as the preferred online marketing method, followed by influencer or content creator collaborations with a specific fashion brand. The third preferred method was the sponsored posts or advertisements that appear on social media, and the least preferred method was email subscriptions. The second preferred ranking order places email subscriptions as the most preferred, followed by following a fashion retailer’s social media page, sponsoring social media advertising, and, lastly, content creator collaborations.

**Table 5.7: Ranking fashion marketing methods from your most preferred (first) to your least (fourth) preferred way of receiving marketing communication from a retailer**

RANKING	TOTAL RESPONSES
Following a fashion retailer's social media pages, Influencer/ content creator marketing collaborations, Sponsored Social media advertising, Email subscriptions	24
Email subscriptions, Following a fashion retailer's social media pages, Sponsored Social media advertising, Influencer/ content creator marketing collaborations	23
Sponsored Social media advertising, Following a fashion retailer's social media pages, Influencer/ content creator marketing collaborations, Email subscriptions	17
Following a fashion retailer's social media pages, Sponsored Social media advertising, Influencer/ content creator marketing collaborations, Email subscriptions	16
Influencer/ content creator marketing collaborations, Following a fashion retailer's social media pages, Sponsored Social media advertising, Email subscriptions	14
Influencer/ content creator marketing collaborations, Sponsored Social media advertising, Following a fashion retailer's social media pages, Email subscriptions	12
Following a fashion retailer's social media pages, Email subscriptions, Influencer/ content creator marketing collaborations, Sponsored Social media advertising	7
Following a fashion retailer's social media pages, Influencer/ content creator marketing collaborations, Email subscriptions, Sponsored Social media advertising	7
Sponsored Social media advertising, Email subscriptions, Following a fashion retailer's social media pages, Influencer/ content creator marketing collaborations	7
Sponsored Social media advertising, Influencer/ content creator marketing collaborations, Following a fashion retailer's social media pages, Email subscriptions	7
Following a fashion retailer's social media pages, Sponsored Social media advertising, Email subscriptions, Influencer/ content creator marketing collaborations	6
Influencer/ content creator marketing collaborations, Email subscriptions, Following a fashion retailer's social media pages, Sponsored Social media advertising	2

<b>Influencer/ content creator marketing collaborations, Email subscriptions, Sponsored Social media advertising, Following a fashion retailer's social media pages</b>	2
<b>Influencer/ content creator marketing collaborations, Following a fashion retailer's social media pages, Email subscriptions, Sponsored Social media advertising</b>	2
<b>Sponsored Social media advertising, Email subscriptions, Influencer/ content creator marketing collaborations, Following a fashion retailer's social media pages</b>	2
<b>Sponsored Social media advertising, Following a fashion retailer's social media pages, Email subscriptions, Influencer/ content creator marketing collaborations</b>	2
<b>Influencer/ content creator marketing collaborations, Sponsored Social media advertising, Email subscriptions, Following a fashion retailer's social media pages</b>	1
<b>Sponsored Social media advertising, Influencer/ content creator marketing collaborations, Email subscriptions, Following a fashion retailer's social media pages</b>	1

When considering the most selected ranking order as well as the number of times each method was ranked first, second, third or fourth, the study made the following observations. **Email subscriptions** are the least preferred method by the respondents of the survey as they were mainly ranked third or fourth, as presented in both tables. The most preferred methods were **following a fashion retailer's social media page** and **sponsored social media advertising**.

The same approach was applied when analysing the respondents' ranking of the most to least preferred digital fashion communication media. The respondents were required to rank their preferences for images, videos, giveaway competitions, and interactive polls. Table 5.6 shows that the most preferred media based on the ranking order are **videos**, **images**, and **interactive polls**, and the least preferred are **giveaway competitions**. The second most selected ranking order was **images**, **videos**, **interactive polls**, and **giveaway competitions**, which were placed last again.

**Table 5.8: Ranking digital fashion communication from your most preferred (first) to your least (fourth) preferred way of receiving marketing communication from a retailer**

RANKING	TOTAL RESPONSES
<b>Videos</b> , <b>Images</b> , <b>Interactive polls</b> , <b>Giveaway competitions</b>	42
<b>Images</b> , <b>Videos</b> , <b>Interactive polls</b> , <b>Giveaway competitions</b>	37
<b>Images</b> , <b>Videos</b> , <b>Giveaway competitions</b> , <b>Interactive polls</b>	20
<b>Videos</b> , <b>Images</b> , <b>Giveaway competitions</b> , <b>Interactive polls</b>	20
<b>Images</b> , <b>Giveaway competitions</b> , <b>Videos</b> , <b>Interactive polls</b>	6
<b>Giveaway competitions</b> , <b>Videos</b> , <b>Images</b> , <b>Interactive polls</b>	4
<b>Images</b> , <b>Interactive polls</b> , <b>Videos</b> , <b>Giveaway competitions</b>	4
<b>Interactive polls</b> , <b>Giveaway competitions</b> , <b>Videos</b> , <b>Images</b>	4
<b>Videos</b> , <b>Interactive polls</b> , <b>Giveaway competitions</b> , <b>Images</b>	3
<b>Videos</b> , <b>Interactive polls</b> , <b>Images</b> , <b>Giveaway competitions</b>	3
<b>Giveaway competitions</b> , <b>Images</b> , <b>Videos</b> , <b>Interactive polls</b>	2
<b>Giveaway competitions</b> , <b>Interactive polls</b> , <b>Videos</b> , <b>Images</b>	2
<b>Videos</b> , <b>Giveaway competitions</b> , <b>Images</b> , <b>Interactive polls</b>	2
<b>Giveaway competitions</b> , <b>Videos</b> , <b>Interactive polls</b> , <b>Images</b>	1
<b>Interactive polls</b> , <b>Images</b> , <b>Giveaway competitions</b> , <b>Videos</b>	1

Interactive polls, Images, Videos, Giveaway competitions	1
Interactive polls, Videos, Giveaway competitions, Images	1

Taking into consideration the data in Table 5.6 and the number of times a specific digital communication medium was ranked first, second, third or fourth, as shown in Table 5.8, the study made the following observations. Most respondents preferred the digital fashion communication medium for its images, closely followed by videos. Giveaway competitions are the least preferred digital fashion communication medium amongst the respondents.

**Table 5.9: A tally of the Ranking Order for Digital Fashion Communication Media**





RANKING		1st	2nd	3rd	4th
COLOUR	GREY	5	3	6	1
	OLIVE GREEN	4	5	3	5
	BLUE	4	4	3	6
	RED	4	3	5	5

This observation does correspond with the findings that revealed that the most used social media platform among the respondents is Instagram, where media such as images and videos are the main media published on this platform, and the same can be said for TikTok. Although Instagram and TikTok are the most used social media, the kinds of content that the respondents engage with may differ. Therefore, the survey wanted to find out how much of the content they consume and engage with on social media is fashion-related. There were 87 who stated that less than half of the content they engage with on social media is fashion and style-related. The remaining 66 stated that more than half of the content they engage with is fashion and style-related. The last theme discussed is customer experience and feedback impacting brand loyalty.

#### 5.5.4 Customer experience and feedback impacting brand loyalty

Section 5.4 presents an overview explaining how the study of emojis in the comments sections of all nine fashion company's social media was applied to the survey questions. This application of the emojis in deducing meaning and symbols from the context of how the emojis were used speaks to the netnographic principles of the researcher becoming a research subject or instrument by being immersed within the digital and online case studied. The last two questions of the survey employed the use of emojis, and respondents were required to rate all of the nine fashion companies. The first two questions from the survey's findings were rated based on the respondent's perceived level of satisfaction with marketing methods and brand loyalty to the fashion companies. Table 4.8 includes the emojis and the corresponding meanings associated with it.

**Table 5.10: Rating the level of consumer satisfaction with current marketing methods and the level of brand loyalty for each of the nine fashion companies**

 = Very satisfied or very loyal
 = Satisfied or loyal
 = Neither satisfied nor dissatisfied or neither loyal nor disloyal
 = Not satisfied or not a customer

The first rating question required that respondents rate their level of satisfaction with the digital fashion marketing content and methods for each of the nine companies. The respondents were given four rating options: very satisfied, satisfied, neither satisfied nor dissatisfied, and not satisfied.

Table 5.9 provides an overview of all nine fashion companies and the number of responses per rating. The table also includes the total number of responses that were left blank. Table 5.9 shows that Shein received the highest number of respondents, with 55 stating that they were very satisfied with marketing content and methods, but they also received the highest number (32) who said they were not satisfied in comparison to the other eight fashion companies. Mr Price received 52 who said they were very satisfied with the marketing content and methods, and The Fix received the third-highest (46) who said they were very satisfied, YDE received the lowest rating from respondents who were

very satisfied or satisfied with their marketing content, and lastly Legit. In addition to Legit's low satisfaction rating, they also received the second-highest number of respondents who said they were unsatisfied with their current digital fashion marketing content methods and media.

**Table 5.9: Ranking Respondent's Level of Satisfaction with Digital Fashion Marketing Content for the Nine Fashion Companies**

COTTON ON			LEGIT			THE FIX		
Emoji	Corresponding meaning	Total responses	Emoji	Corresponding meaning	Total responses	Emoji	Corresponding meaning	Total responses
🔥🔥😍	Very satisfied	30	🔥🔥😍	Very satisfied	15	🔥🔥😍	Very satisfied	46
❤️❤️👍	Satisfied	65	❤️❤️👍	Satisfied	34	❤️❤️👍	Satisfied	36
😐😐	Neither satisfied nor unsatisfied	40	😐😐	Neither satisfied nor unsatisfied	70	😐😐	Neither satisfied nor unsatisfied	55
❌🚫	Not satisfied	15	❌🚫	Not satisfied	26	❌🚫	Not satisfied	8
Blank		3	Blank		8	Blank		8
FACTORIE			MR PRICE			YDE		
😍	Very satisfied	21	🔥🔥😍	Very satisfied	52	🔥🔥😍	Very satisfied	7
❤️❤️👍	Satisfied	42	❤️❤️👍	Satisfied	64	❤️❤️👍	Satisfied	28
😐😐	Neither satisfied nor unsatisfied	60	😐😐	Neither satisfied nor unsatisfied	28	😐😐	Neither satisfied nor unsatisfied	88
❌🚫	Not satisfied	24	❌🚫	Not satisfied	4	❌🚫	Not satisfied	21
Blank		6	Blank		5	Blank		9
H&M			SHEIN			ZARA		
😍	Very satisfied	35	🔥🔥😍	Very satisfied	55	🔥🔥😍	Very satisfied	35
❤️❤️👍	Satisfied	62	❤️❤️👍	Satisfied	34	❤️❤️👍	Satisfied	50
😐😐	Neither satisfied nor unsatisfied	39	😐😐	Neither satisfied nor unsatisfied	28	😐😐	Neither satisfied nor unsatisfied	45

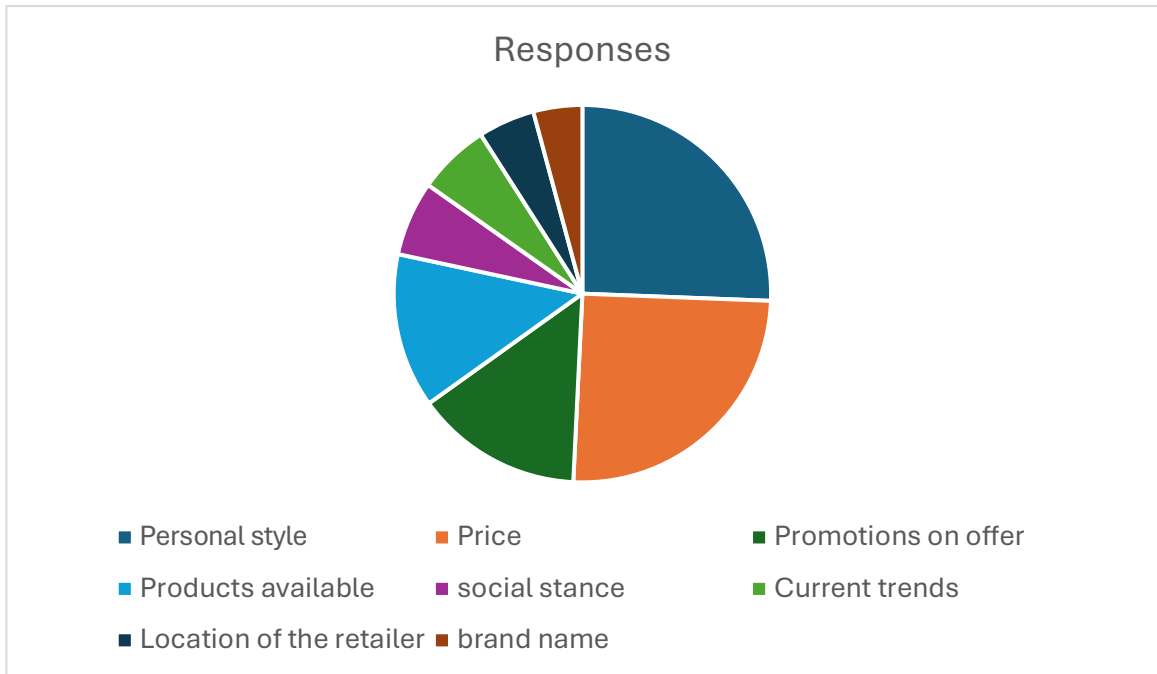
✘	Not satisfied	11	✘	Not satisfied	32	✘	Not satisfied	16
Blank		6	Blank		4	Blank		7

The second survey question that made use of the emoji symbols explained in Table 5.9 required the respondents to rate their level of brand loyalty to each of the nine fashion companies employed as a case for this study. The respondents were required to select one of the four ratings for each company: very loyal, loyal, neither loyal nor disloyal, or not a customer.

Table 5.10 presents the very loyal and loyal ratings towards all nine fashion companies. Mr Price received the highest number of ratings, Shein the second highest, and The Fix the third highest. Companies that presented average very loyal and loyal ratings were Cotton On, Factorie, and H&M. Companies with the lowest ratings were YDE and Legit. YDE also received the lowest number of ratings from respondents who stated they were not YDE customers.

When considering the results presented in Tables 5.9 and 5.10 holistically, the findings begin to present patterns related to the effectiveness of digital fashion communication aligned to the company value proposition and their core marketing aspects of product, place, price, and promotion. All these factors are discussed in this section by analysing the data presented in the fashion consumer survey. Fashion companies such as Mr Price, Shein, and The Fix present consistent value to their consumers by understanding their key consumer market and how to communicate fashion product information. Additionally, the outlined value proposition of these companies shows that they are in alignment with the products they sell and the applied core marketing aspects or the 4Ps (price, product, promotion, and place) for the targeted Gen Z consumer.

To further emphasise the findings already presented and analysed above, the next survey question presents the data on what factors inform the survey respondents' choice when purchasing from a specific fashion company or brand. The question allowed for a multiple-choice answer from the following choices: price, products available, promotions on offer, location of the retailer, personal style, current trends, brand name, and the brand or company's social stance. The last option of the brand or company's social stance refers to factors such as sustainable sourcing of products, gender equality values, and adherence to fair labour practices.



**Figure 5.9: The Factors that Influence Respondents 'Purchasing Decisions**

Figure 4.9 represents all 153 respondents' selection of the factors that influence their fashion purchasing decisions. The highest factor selected was personal style (116), followed by price (114), promotions on offer (65), products sold and available at a specific retailer (60), stance on social and environmental reform (29), access to current fashion trends (28), place or the location of the retailer (22), and consideration of the brand name (19).

**Table 5.12: Ranking Respondent’s Level of Brand Loyalty to the Nine Fashion Companies**

COTTON ON			LEGIT			THE FIX		
Emoji	Corresponding meaning	Total responses	Emoji	Corresponding meaning	Total responses	Emoji	Corresponding meaning	Total responses
🔥🔥😬	Very loyal	32	🔥🔥😬	Very loyal	13	🔥🔥😬	Very loyal	32
❤️❤️👍	Loyal	31	❤️❤️👍	Loyal	27	❤️❤️👍	Loyal	36
😐😬	Neither loyal nor disloyal	50	😐😬	Neither loyal nor disloyal	40	😐😬	Neither loyal nor disloyal	32
✖️🚫	Not a customer	35	✖️🚫	Not a customer	68	✖️🚫	Not a customer	50
Blank		5	Blank		5	Blank		3
FACTORIE			MR PRICE			YDE		
😬	Very loyal	15	🔥🔥😬	Very loyal	55	🔥🔥😬	Very loyal	6
❤️❤️👍	Loyal	24	❤️❤️👍	Loyal	46	❤️❤️👍	Loyal	18
😐😬	Neither loyal nor disloyal	43	😐😬	Neither loyal nor disloyal	36	😐😬	Neither loyal nor disloyal	40
✖️🚫	Not a customer	65	✖️🚫	Not a customer	13	✖️🚫	Not a customer	82
Blank		6	Blank		3	Blank		7
H&M			SHEIN			ZARA		
😬	Very loyal	25	🔥🔥😬	Very loyal	31	🔥🔥😬	Very loyal	23
❤️❤️👍	Loyal	41	❤️❤️👍	Loyal	39	❤️❤️👍	Loyal	24
😐😬	Neither loyal nor disloyal	45	😐😬	Neither loyal nor disloyal	33	😐😬	Neither loyal nor disloyal	38

✘	Not a customer	36	✘	Not a customer	46	✘	Not a customer	62
Blank		6	Blank		4	Blank		6

In the final question, respondents were required to identify areas where the nine fashion companies could improve their value offerings. This question also made use of emojis to represent the multiple-choice answers the respondents could select. Table 4.11 represents all five options presented as potential answers. Respondents could select the following answers: value of the products sold, relevant digital marketing content and affordable prices. In addition to these three responses, the respondent could subsequently select an option to select all of the above-mentioned responses or none of the above responses.

**Table 5.13: Key and the corresponding value for rating areas for improvement for the nine fashion companies**




 = Value of the products sold
 = Relevant digital marketing (promotional) content
 = Affordable prices
All of the above
None of the above

Table 5.12 presents the responses from the survey for all nine companies. When analysing the number of value of the product sold responses, Mr Price received the highest (77), Shein (65), Legit (46), and YDE (42). When analysing the number of improvements in offering affordable prices, Cotton On received the highest (92), Zara (81), and Factorie (61). The number of responses selected for all of the above or none of the above was significantly lower compared to the first three choices for all nine fashion companies, receiving less than 20 for this choice.

When analysing the number of responses that suggest the least improvements or “none of the above” related to the product offering, marketing content, and affordable prices, The Fix received the highest (35), followed by Shein and YDE (34).

**Table 5.13: Areas of Improvement**

COTTON ON			LEGIT			THE FIX		
Emoji	Corresponding meaning	Total responses	Emoji	Corresponding meaning	Total responses	Emoji	Corresponding meaning	Total responses
	Value of the products sold	30		Value of the products sold	35		Value of the products sold	31
	Relevant digital marketing (promotional) content	7		Relevant digital marketing (promotional) content	46		Relevant digital marketing (promotional) content	28
	Affordable prices	92		Affordable prices	20		Affordable prices	36
All of the above		13	All of the above		22	All of the above		17
None of the above		9	None of the above		21	None of the above		35
blank		2	blank		9	blank		6
FACTORIE			MR PRICE			YDE		
	Value of the products sold	21		Value of the products sold	77		Value of the products sold	19
	Relevant digital marketing (promotional) content	30		Relevant digital marketing (promotional) content	11		Relevant digital marketing (promotional) content	42
	Affordable prices	61		Affordable prices	20		Affordable prices	36
All of the above		15	All of the above		18	All of the above		17
None of the above		20	None of the above		23	None of the above		34
blank		0	blank		4	blank		5
H&M			SHEIN			ZARA		
	Value of the products sold	38		Value of the products sold	65		Value of the products sold	16
	Relevant digital marketing (promotional) content	32		Relevant digital marketing (promotional) content	10		Relevant digital marketing (promotional) content	16

💰	Affordable prices	45	💰	Affordable prices	20	💰	Affordable prices	81
	All of the above	10		All of the above	18		All of the above	12
	None of the above	24		None of the above	34		None of the above	24
	blank	4		blank	6		blank	4

## CHAPTER SIX: INTERPRETATION OF FINDINGS

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This chapter presents the interpretations and delineations of the findings analysed and discussed in Chapter 5. The outline of this chapter is guided by the main objective of interpreting the findings according to this study's research question and sub-research questions. In addition, the applied conceptual framework assists in making relevant interpretations of the findings to evaluate the effectiveness of digital fashion communication and marketing methods targeted at South African Gen Z consumers.

### 6.1 INTRODUCTION AND CHAPTER OVERVIEW

The discussion in this chapter is presented as a response to the study's research questions. Table 6.1 outlines the main research question that this chapter aims to respond to in the interpretation of the findings. The study's main research question is: What are the digital strategy gaps in the fashion industry's marketing communication with South Africa's Gen Z consumers? The main research question is further contextualised through the sub-questions, which are:

- **Sub-question 1:** How can social media positively or negatively impact digital communication in the marketing of fashion products and services to Gen Z consumers?
- **Sub-question 2:** What criteria related to digital fashion communication methods are expected by Gen Z consumers that are influenced by societal factors and inform their purchasing decisions?
- **Sub-question 3:** How can the establishment of a model evaluating the effectiveness of digital fashion marketing strategies to Gen Z inform and develop relevant digital marketing communication strategies for Gen Z fashion consumers?
- **Sub-question 4:** What emerging trends should the industry adopt to maximise their marketing results with Gen Z consumers?

**Table 6.1: DMEF Application to the Study's Objectives**

<b>Research question:</b> What are the digital strategy gaps in the fashion industry's marketing communication with South Africa's Gen Z consumers?	
<b>Sub-questions of the study</b>	<b>Application of the DMEF</b>
<b>Sub-question 1:</b> How can social media positively or negatively impact digital communication in the marketing of fashion products and services to its Gen Z consumers?	<ul style="list-style-type: none"> <li>• Value proposition</li> <li>• Digital hedonic rhetoric</li> <li>• Digital stimulus</li> </ul>
<b>Sub-question 2:</b> What criteria related to digital fashion communication methods are expected by Gen Z consumers that are influenced by societal factors and inform their purchasing decisions?	<ul style="list-style-type: none"> <li>• Empathy / empathic inferences</li> <li>• Collect data / define</li> <li>• Environment</li> <li>• Outcomes – value for customer + customer value</li> <li>• Company</li> </ul>
<b>Sub-question 3:</b> How can the establishment of a model evaluating the effectiveness of digital fashion marketing strategies to Gen Z inform and develop relevant digital marketing communication strategies for Gen Z fashion consumers?	<ul style="list-style-type: none"> <li>• Holistic intention of the DMEF</li> </ul>
<b>Sub-question 4:</b> What are the emerging trends that the industry should adopt to maximise their marketing results with Gen Z consumers?	<ul style="list-style-type: none"> <li>• Holistic intention of the DMEF</li> </ul>

Table 6.1 also includes the key attributes of the DMEF and how components of the framework directly relate to unearthing relevant interpretations from the findings and deducing emerging trends and opportunities that could be applied to digital fashion communication approaches. In section 3.2, the first iteration of the conceptual framework was explained and how it guides the identification of key themes from the data for analysis and discussion. Subsequently, in sections 5.2 and 5.4, the DMEF was applied by grouping the discussions according to the following main categories.

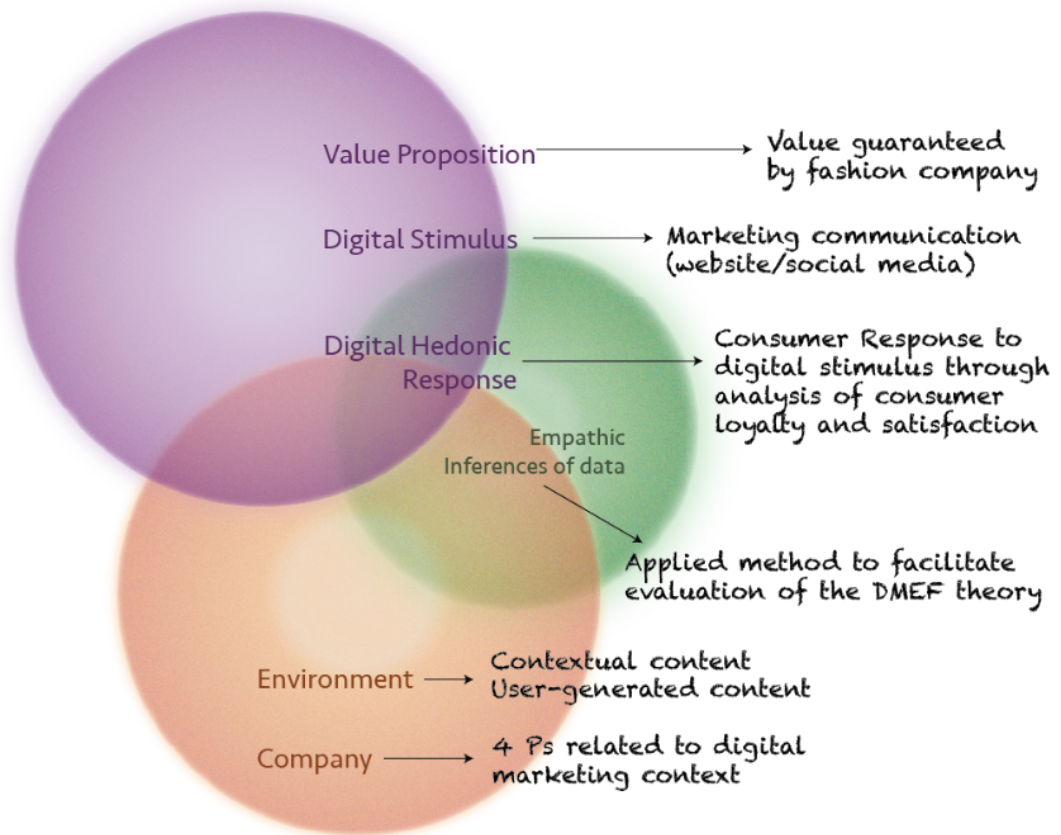
- The digital stimulus explored the data collected in phase one, which consisted of all the social media accounts and e-commerce websites of the nine fashion companies. In the second phase, the data was analysed to understand the survey respondents' social media and digital fashion communication experiences and social media engagement preferences.

- The value proposition for each of the nine fashion companies was identified and defined in the first phase of data collection. In the second phase of data collection, the respondents' experiences and fashion consumer behaviour were explored to delineate the consumer's key influences that inform their fashion purchasing decisions.
- The environment presented all relevant data that pertained to a fashion company's core marketing aspect, the 4Ps, and analysis related to product, price, place, and promotion was discussed. The first phase of data collection presented findings of three of the 4Ps (product, promotion, and place). Phase two of data collection presented findings related to the fourth P, being price and the Gen Z consumer's perceived value of this core marketing aspect.
- The digital hedonic rhetoric in both phases of data collection explored the level of consumer engagement, satisfaction, and patterns, deducing opportunities to propose approaches to enhancing the effectiveness of digital fashion communication approaches.

Subsequent to the analysis and discussion of findings in Chapter 5 and taking into consideration the findings where the first iteration of the DMEF was applied, the research now presents a second iteration of the DMEF model.

The first iteration, outlined in Chapter 4 and applied to Chapter 5, presented the concept and key components adapted from pre-existing theoretical frameworks. In order to determine effectiveness, the framework aims to evaluate key attributes: the value proposition, the digital hedonic rhetoric, the company's 4Ps (price, product, promotion, and place), and the environmental outcomes. This chapter presents each of the aforementioned attributes and the revisions that have been applied to the design and visual depiction of the framework. This iterative approach to developing and refining the DMEF aligns with the analytical depth and application of the integrated frameworks to ensure alignment in how the frameworks that informed the DMEF relate to each other for the purpose of evaluating effectiveness, as outlined in the study's objective.

Figure 6.1 visualises the DMEF by depicting the various attributes of the framework and the subsequent intersection or merging of the various components upon critical reflection and analysis of the data. Subsequently, this visual re-depiction of the framework is accompanied by refining the key terms or attributes of the DMEF.



**Figure 6.1: Attributes of the DMEF Presented as a Second Iteration**

### 6.1.1 Value Proposition

Each company's value proposition was identified to ascertain whether the fashion marketing communication correlates to the guaranteed value that the company is offering to the consumer. A key element across all companies related to the respective value propositions emphasises style and product variance, which is complemented by affordable price offerings. In relation to the DMEF and the inclusion of the value proposition which emanated from the Digital affect framework (Wrigley & Straker 2019), this component of data analysis was effective. The analysis of the value proposition allowed for a benchmarking criterion for the research to refer to when evaluating other components of the DMEF. It offered a sound starting point in establishing how each company prioritises consumer loyalty to the brand and if the consumer, in turn, perceives the value proposition to be in alignment or not.

A company such as Mr Price that states “*Value = Price + quality + fashion + convenience + experience*”. The Gen Z consumer cohort did not perceive the value proposition to be effective, in terms of the quality of the product. However, components related to the company guaranteeing price, convenience and experience, there was a strong correlation with consumer perceived value and what the company outlines as their value proposition. A similar analysis was made of Shein. Perceived value of sustainable practice was an embedded theme in the review of the consumer survey data. Consumers highlighted an awareness or acknowledgement of valuing sustainability in fashion purchasing. Considering that all nine fashion companies are characterised as fast fashion brands, ensuring sustainable practice will always be met with scepticism by consumers. This was evident in the comments sections of brands such as H&M, Shein, and Cotton On. The argument can be made that fast fashion brands cannot be sustainable; however, value propositions that guarantee sustainability must reflect a transparent and deliverable objective that a consumer can make sense of. Such an approach will mitigate brands from being accused of greenwashing.

Greenwashing in marketing is defined as a prevalent and often misleading practice in which companies portray a deceptive image of environmental responsibility to consumers (Hayes 2025). This is becoming more prevalent as investors and consumers increasingly favour sustainable products (Hayes 2025). The application of the DMEF in relation to the value proposition allows for an evaluation that aligns with the company’s core marketing and business objectives while integrating the consumer’s perception of the value proposition to offer insights and recommendations. A key recommendation is to consistently and transparently integrate the company’s value proposition to the digital fashion communication and marketing strategies employed to promote the brand and product. An example of this may include campaigns that reflect a company’s implementation of sustainable practices that are not misleading. Certain marketing approaches, such as consumer collaborative content or influencer marketing strategies, could be employed to portray a unified message that merges company value and targets with consumer loyalty and interaction. As consumers are becoming more informed and less passive recipients in the purchasing process, their perception of brand value is vital in ensuring company loyalty.

### 6.1.2 Digital stimulus

The digital stimulus refers to the marketing and promotional communication that the company creates and publishes on its digital channels, such as its website and its official social media channels. The identification and evaluation of the stimulus were correlated with the attributes of the DMEF. The digital stimulus originally emanates from the Digital Affect framework and is positioned as the nucleus of all consumer-related activity, interaction and engagement with a company's marketing communication (Wrigley & Straker, 2019). In relation to the DMEF and applied data, the digital stimulus assisted in providing the data to make certain delineations and evaluate the effectiveness of the value proposition or consumer satisfaction or engagement with the fashion company. The stimuli that were sourced included screenshots of the comments section of various social media posts, images, and watching of videos shared as promotional content for all nine fashion companies. The collected and analysed stimuli further informed the line of questioning presented in the survey. The survey served as the netnographic-informed member checks, which served to avoid researcher bias. Subsequent to this, the survey did not identify additional forms of digital fashion communication stimuli from the survey respondents.

Wrigley and Straker (2019) emphasise that the digital stimulus is more than just posting marketing content on social media, as it also requires consideration of how the company communicates its value while providing a memorable consumer experience. From the analysed data, companies have not applied a consistent approach to the type of content posted on their various online channels. This analysis is made in relation to the preferred media and social media channels for fashion communication by Gen Z survey respondents. Further supported by Rachmad's (2023) suppositions that traditional engagement methods are increasingly less effective in a competitive and fast-paced digital landscape. Companies must think creatively and innovatively about the digital fashion content they share and how they want consumers to engage with this content. This strategy can be aligned with the company's value proposition, where more innovative digital stimuli are conceptualised and created based on a holistic application of the company's value, strategically integrated or aligned with consumer interaction and satisfaction. The term innovative engagement in relation to the Innovative Engagement theory refers to the application of novel and creative tactics that leverage advances in technology and insights from psychology to not only capture attention but also foster

active participation and meaningful connections with content (Rachmad 2023). The DMEF empathic delineation qualities further support such interventions if applied to evaluating the effectiveness of digital fashion communication and assist in offering innovative opportunities to improve a company's digital stimuli.

### **6.1.3 Environment and the Digital Hedonic Response**

The environment in relation to the DMEF explored the external factors that affect a company's marketing strategy. These external factors are the marketing-related activities that influence the position and strategy of the company. Examples of this from the findings included the Gen Z consumers' shopping experiences with the various nine fashion companies, Gen Z consumers' interaction with digital fashion communication generated by the fashion company, and content creators or their own generated social media content. The company is a variable that exists as a component within the environment. This variable in the second iteration maintains its objective as outlined in section 3.2.3.2 to evaluate the effectiveness of each identified fashion company's 4 P (product, price, promotion, and place). The 4Ps were identified and described in section 2.3.1.1 for all nine fashion companies.

Subsequent to the analysis and discussion in Chapter 5, the research notes similarities in the variables of the framework that may yield more clarity for the purpose of interpreting the findings in this chapter if consolidated. The variables of the framework that have been combined are the digital hedonic rhetoric, the environment and the outcomes. The digital hedonic rhetoric explored the Gen Z consumer's response, engagement and interaction with the fashion company's digital stimulus or digital marketing communication methods and media. The applied framework evaluates a fashion company's digital hedonic rhetoric to delineate the level of consumer satisfaction that Gen Z associates with the specific company. The explanation of the digital hedonic rhetoric correlates and intersects with the purpose of evaluating the company's outcomes, as outlined in the paragraph above. The research explores a fashion company's outcomes in relation to the company's brand loyalty and satisfaction achieved through marketing communication and promotion. Therefore, the evaluation of the digital hedonic rhetoric and the subsequent outcomes relating to customer loyalty and satisfaction are mutually exclusive.

In the context of the DMEF, the variables both aim to evaluate the effectiveness of a company's marketing strategy that yields or ensures customer loyalty and satisfaction. Therefore, the research considers a revised term that best encompasses the consolidated variable for the appropriate interpretation of the findings in this chapter. The digital hedonic response encompasses the framework variables that concern the evaluation of the effectiveness of digital fashion marketing in relation to consumer engagement, satisfaction and loyalty to the brand. The inclusion of the word 'response' refers to the response to engagement, satisfaction, and brand loyalty that the survey respondents had when rating levels of satisfaction, loyalty to the brand and areas of improvement for a fashion company's core marketing aspects.

As outlined above, a consumer's response to digital fashion promotional communication and marketing, the product, price and place are becoming more informed and engaged because of the fast-paced digital landscape. Kanan and Li (2017) highlight how competing stakeholders such as competitor brands, user-generated content, and consumer reviews all fall within the digital marketing landscape and inform how a consumer responds to fashion communication and marketing.

An analysis of the company's core marketing aspect in relation to Kanan and Li's context to digital marketing emphasises how a realignment of the core marketing aspects must take place for the digital landscape. The product requires alignment with digital integrations. Opportunities for enhancing product satisfaction through digital integration include virtual changing rooms, augmented reality (AR) that allows the consumer to simulate a changing room experience. Shopify (2025) explores how fashion brands use AR. Some examples from global fashion brands include the virtual changing room, virtual fashion shows and AR mirrors (Shopify 2025). While the examples cannot yet be identified in the local retail or fashion industry of South Africa, the article does refer to smaller international brands that have successfully implemented AR in the communication of products in the digital retail environment. Through evaluating the level of effectiveness of the value in product communication based on consumer response, opportunities to enhance consumer satisfaction were evident. Such opportunities include collaborative limited-edition fashion products. Brands such as Mr Price and H&M have done this successfully in the past, where they collaborated with South African designers and artists to create a limited-edition clothing range (colón 2019; Between 10 and 5 2023; Connect Everything Collective 2025).

Opportunities for enhancing the fashion product could align with the Gen Z consumer preference of customisability, where product communication is customised to consumer preference. This could be applied to how customers shop online and their associated shopping cart or shopping wish list. Companies such as Superbalist have created a customised shopping experience where consumers receive customised emails promoting fashion products that the consumer has placed in their wish list that are now on sale or at a discounted price. This opportunity aligns with enhancing the product environment or place, as termed in the core marketing aspect.

Kannan and Li (2017) discuss place, which concerns the digital age and how companies or firms now communicate with their consumers through smartphones, tablets, laptops, and computers. In both phases of data collection, it was confirmed that consumers do research online via their smartphones on the availability of products. This is done through the websites of the respective fashion company, through the company's social media or through engaging with user-generated content on social media. Similar observations can be made in the analysis of where and how digital fashion communication is marketed, which requires realignment of the core marketing aspects with digital integrations. The data also presented a preference for a combination of online shopping and shopping in the physical store. Opportunities that explore a phygital shopping experience where digital integrations are applied within the physical store.

## **6.2 FINDINGS AS THEY RESPOND TO THE SUBQUESTIONS**

Following this executive introduction to this chapter, the next section provides the interpretation of findings that respond to the sub-question:

### **6.2.1 How can social media positively or negatively impact digital communication in marketing fashion products?**

This section offers an interpretation of the first research sub-question, as detailed in Table 6.1. The data that was analysed exploring the nine selected fashion companies' public social media accounts presented various considerations that may impact the effectiveness of communicating fashion product information. It was confirmed that Gen Z does have a preference for social media platforms, namely Instagram and TikTok. Furthermore, these social media platforms specifically for interacting with digital fashion communication offer fashion companies relevant tools such as video and image formats

to communicate product information. In addition, Gen Z's preference for social media as a tool used to foster their social community networks, which is important to them, is best maintained on social media platforms like Instagram and TikTok.

Gen Z views social media and the online community and interaction as an extension of their daily activities in fostering genuine connection (Kullolli & Trebicka 2023; Lajnef 2023). The findings emphasise how Gen Z does not relate to all social media, such as X and Facebook. As a result of this, the findings of the nine fashion companies show less attention or emphasis when managing their accounts, such as X and Facebook, as the key consumer demographic is Gen Z. The neglect of certain social media channels, such as X and Facebook by Cotton On, Factorie and Zara does present an argument of social media saturation. Gen Z is described as the first truly digital generation, further substantiating the argument that if some platforms do not present relatable content or relatable user interfaces, they will lose even more relevance and adoption by generations such as Gen Z and Gen Alpha. These observations of South African Gen Z individuals correspond to research exploring social media usage and the influencing factors for preferred social media channels undertaken in recent years (Naeem & Ozuem 2022; Dlamini & Daniels 2023; Kullolli & Trebicka 2023; PWC 2023).

Customer dissatisfaction arises when brands fail to respond to comments, especially on platforms that Gen Z engages with actively. This dissatisfaction speaks to Gen Z valuing the connection and interaction they prioritise on social media. Social media accounts that are not managed actively lead to low levels of engagement and impact perceived levels of value with digital natives such as Gen Z. Fashion companies that did not actively manage their X accounts, such as Factorie and Zara, did not gain high-level responses for consumer satisfaction with marketing content. This observation aligns with studies that highlighted the importance of social media influencing purchasing decisions and the impact of UGC, such as reviews and social media comments on consumer behaviour (Naeem & Ozuem 2022; PWC 2023; Nodirovna & Sharif o'g'li 2024).

The negative impacts that social media may have on the communication of fashion product information rely on the relevance of the social media platform and what and how the information is communicated. Relatable and authentic communication methods work best with Gen Z consumers (PWC 2023). The fashion companies that were rated high in terms of brand loyalty and marketing communication methods were The Fix and Mr Price.

There is a saturation point of online media and content that social media users engage with and sift through (Harahap, Marpaung & Asengbaramae 2023; Reid, Button & Brommeyer 2023b; Deloitte 2024a). Most Gen Z respondents spend more than three hours a day on social media. Therefore, engaging content that creates a sense of relevant community is received positively. This need for engaging content was evident in the findings that reveal that Gen Z prefers following the social media accounts of fashion companies and engaging with sponsored social media posts promoting fashion product information.

### **6.2.2 What criteria related to digital fashion communication methods are expected by Gen Z consumers that are influenced by societal factors and inform their purchasing decisions?**

This section unpacks the interpretations related to the second research sub-question. The findings show that digital fashion communication must be contextually relevant for South African Gen Z consumers. The format of the communication is important. This statement is further supported by the findings, which revealed that the majority of Gen Z respondents do not prefer subscribing to company mailing lists to receive digital fashion communication. Gen Z's most preferred form of digital fashion communication method is following retailer social media accounts. The third most preferred form of digital fashion communication was influencer or content creator collaborations with fashion companies. Although this was not the most preferred method of receiving fashion communication, the findings acknowledge the impact influencer marketing has on digital fashion communication that is relevant to the younger digital native generations. Lajnef (2023) explored the psychology of the effect of social media influencers on Gen Z teenagers aged 14 to 17 from Tunisia. The findings of that study revealed that persuasive social media content from influencers who are perceived as credible and trustworthy by Gen Z has a significant impact on their attitudes and behaviours. In addition, social media influencers play a pivotal role in shaping the behaviours and attitudes of teenagers (Lajnef 2023).

While this study explored the effectiveness of digital fashion communication strategies targeted at South African consumers, the findings do reveal that the respondents aged between 18 and 19 had a preference for social media influencer promotional content. Furthermore, the study highlights the potential spending power Gen Z yields (Bucholz

2024), which requires fashion companies to understand the best methods to communicate with this consumer segment on digital platforms such as influencer marketing campaigns.

The findings that present Gen Z consumers' preference for content creator collaborations with fashion companies also emphasise a preference for promotional content that is relevant to the consumer's local socio-cultural content. Fashion companies such as Zara and H&M, which do not have a South African social media presence and instead host internationally run social media, were not interpreted as brands that the respondents were loyal to. An international fashion company that did yield high levels of satisfaction and loyalty was Shein. Shein has customised digital fashion communication for their South African consumer market by creating Instagram and TikTok accounts that cater specifically to their South African consumer market.

It was also noticed that Gen Z's preference for content with an element of entertainment or relatable, interactive elements, such as the incorporation of memes or popular trending music or phrases, is related to this (Gupta & Ramachandran 2021; Gupta & Mukherjee 2022; Nodirovna & Sharif o'g'li 2024). This preference further highlights the growing preference for content creator collaborations with fashion companies instead of traditional celebrity-endorsed marketing campaigns (Munsch 2021).

Companies that interact and engage with their Gen Z consumer target market also received higher levels of engagement. All the local brands demonstrated this, responding to followers' comments, whether they were customer queries or customers reviewing their content and satisfaction. This responsiveness added a personal element to the interaction, which garnered more positive engagement.

Most respondents highlighted price sensitivity and affordability as significant factors. Where the price was concerned, some observations were made regarding the respondent's acknowledgement of the relationship between price and the quality of the product. Retailers such as Mr Price and Shein were rated highly for the range of available products, and the respondents rated the two fashion companies highly for improvement in the quality of products. This observation can also be interpreted for the fashion companies Cotton On and Zara, who received high ratings for improvement in the price affordability of the fashion products they have on offer. Price is the key determining factor for South African fashion consumers, which highlights the importance of how promotional

fashion content is presented. While price is a key factor influencing the respondents' purchasing decision, half (54%) shop for fashion products once a month and every two to three months. The selected option characterised the respondent's frequency of shopping for fashion items every two to three months. These findings further support the research done in South Africa, which highlights that the South African retail landscape attributes a small percentage (4.3%) of its retail trade sales to textiles, clothing, footwear, and leather goods (Stats SA 2023). In addition, research exploring the adoption of credit facilities among South African Gen Z identified that credit cards or retail accounts were mostly for purchasing clothing (Transunion 2020; Ventureburn 2020; Pillay 2024). A study such as this, exploring the effectiveness of the marketing and communication of fashion products and information, offers valuable insights into marketing strategies targeting young consumers.

When it comes to consumer awareness of the impact of fashion companies' social and environmental impact, the respondents highlighted their appreciation for brands that include body shape and size variety. All of the nine fashion companies are characterised as fast-fashion brands. Research has revealed the dangerous environmental impact fast fashion brands have to produce on a massive scale, resulting in mass waste and pollution (Angelov 2015; Baena 2024). However, less than half of the respondents stated that they consider a fashion company's social stance and its impact on social and environmental issues. This low rate was a pattern throughout the responses, with some respondents stating that in addition to purchasing from these fashion retailers, they also thrift for second-hand clothes. Local online platforms such as Yaga<sup>4</sup> that centre their value proposition on sustainable fashion practices are becoming more popular. H&M has included their garment collecting programme since 2013 as an incentive that advances sustainable fashion practices by offering their consumer a discount for every second-hand item of clothing they donate or drop off at any H&M store (H&M, no date). Other brands (for example, Zara) have also promoted circular fashion<sup>5</sup> to ensure less pollution

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<sup>4</sup> Yaga is South African online selling and shopping platform for new and preloved fashion (BizCommunity 2024)

<sup>5</sup> Circular fashion can be defined as an approach within the fashion industry that aims to close the loop, reducing waste and maximising the lifespan of clothing and textiles. The closed-loop concept aligns with the principles of the circular economy by reconsidering how garments are designed, manufactured, consumed, and disposed of (The Sustainable Fashion Forum 2024).

and clothing waste, decreasing landfill waste (Baena 2024). It is important to consider that the respondents who stated that they are not consumers of the nine retailers may be thrifting some of the brands, including Zara, Cotton On and H&M, on the local thrifting online and physical markets, such as Yaga.

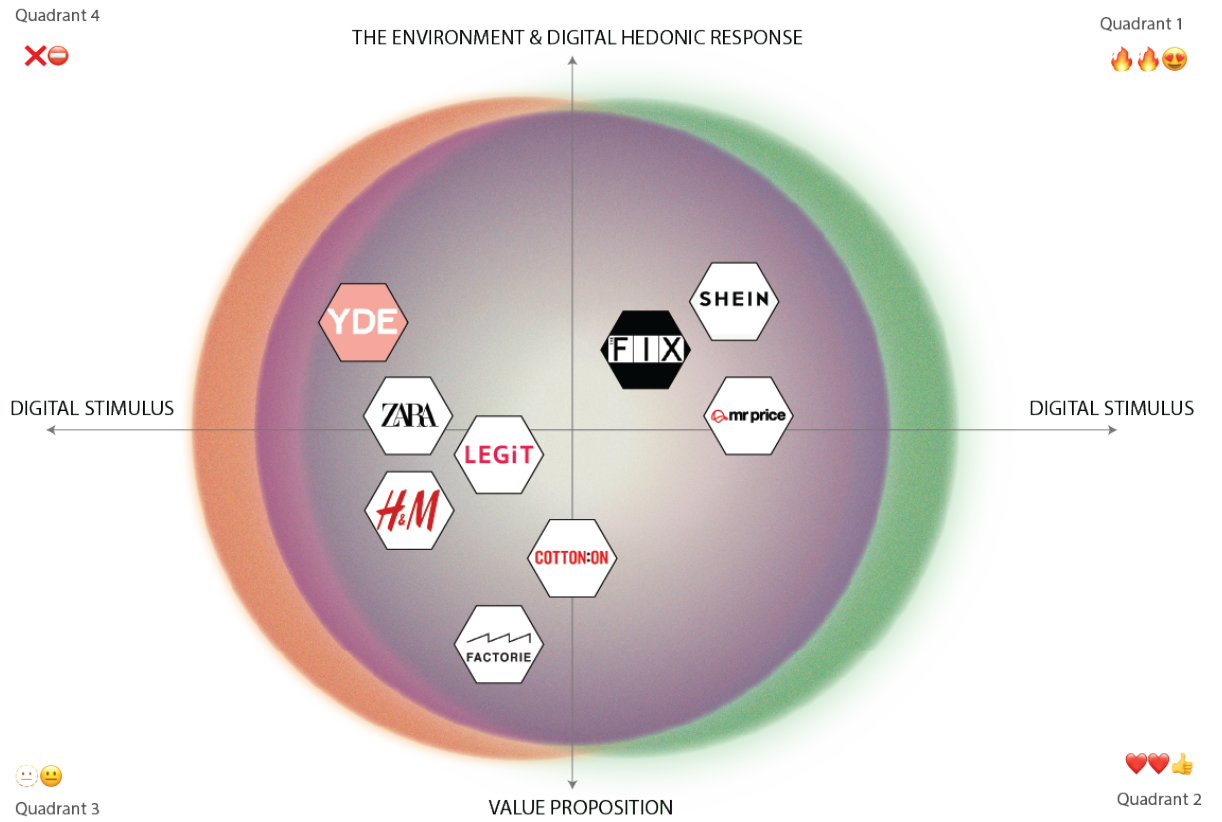
The frequency of shopping being two to three months speaks to environmental factors such as the cost of living. However, social media plays a crucial role in influencing purchasing patterns for Gen Z respondents, as most spend over three hours a day on social media. The majority of the respondents also prefer to follow brands as a form of fashion marketing communication. In addition, UGC appeals to this generation through shopping video hauls and videos of content creators wearing clothing from a specific fashion company or brand (Naeem & Ozuem 2022; Muturi 2024). Another observation in the data is that the UGC garnered more support because the content creators share the collaboration on their personal social media, and their followers or community support by engaging in the post by liking, commenting, and sharing posts. This collaboration speaks to an effective digital stimulus resulting in interaction and engagement.

### **6.2.3 How can the establishment of a model evaluating the effectiveness of digital fashion marketing strategies to Gen Z inform and develop relevant digital marketing communication strategies for Gen Z fashion consumers?**

This section interprets the third research sub-question, which aims to evaluate the digital marketing effectiveness of all nine fashion companies through the application of the DMEF. Furthermore, the DMEF is a key contribution of new knowledge emanating from this study; hence, it is important to interpret its application as one of the key objectives. As outlined above, key factors influencing purchasing decisions included price, quality, style, and sustainability. Engagement with interactive content such as videos and competition giveaways was particularly effective. This observation heavily influenced the visual depiction of the nine fashion companies and the level of perceived effectiveness through empathic inferences made through the data collection and netnographic analysis. Again, the use of the emojis that were observed and interpreted from the secondary data informed the interpretation of Gen Z's perceived value associated with specific digital fashion marketing methods and digital fashion communication media.

Before presenting interpretations for the main research question and outlining emerging trends for South African fashion companies, the study presents a visual positional

mapping of nine fashion companies. This mapping evaluates each company's level of effectiveness in their digital fashion communication methods and content. The evaluation is based on the study's conceptual framework, providing a comparative analysis of their performance. Figure 6.2 presents the visual depiction of the DMEF applied to all nine fashion companies.



**Figure 6.2: Position Mapping According to the DMEF of the Nine Fashion Companies**

The visual model is based on a brand positioning map comprising multiple variables or attributes that contribute to determining company and brand effectiveness. The visual presentation of the DMEF positions the framework's attributes within four quadrants. Each quadrant represents the level of effectiveness of the value proposition, digital hedonic response and the company's core marketing aspects based on the 4Ps (price, product, promotion, and place). High value or satisfaction is represented by 🔥🔥😄, and moderate to high value and satisfaction are represented by ❤️❤️👍. Moderate to low levels of value or satisfaction are depicted by 😐😓, and lastly, low to no levels of value or satisfaction are depicted by ❌🚫. The placement of the retailers in or between one of the four effectiveness quadrants is determined by the fashion retail environment and digital hedonic response, the digital stimulus and the value proposition. All of these attributes were analysed and discussed, and subsequent meanings and interpretations were deduced. These evaluations are based on the empathic inferences delineated from collecting and analysing the relevant data. The placement of the attributes is determined or based on the contextual descriptions and definitions of each attribute outlined in section 6.1 of this chapter.

The Fix and Shein are positioned in the first quadrant according to the evaluation of the DMEF, as they consistently demonstrated high value and satisfaction. This positioning was determined by the analysis of data in phases one and two. The findings presented coherent interpretations of the company's value proposition and the respondents perceived value of these two fashion companies. Their social media channels and the analysed digital stimuli resonated as highly effective amongst the respondents in the survey. Furthermore, the digital hedonic response was evaluated through the survey ratings presented by both fashion companies, obtaining high ratings amongst the respondents. The final survey question of areas to improve further emphasised these two fashion companies as effective according to the study's conceptual framework and the applied interpretation of the survey findings overall.

Mr Price is positioned between the high value to high to moderate quadrants according to the evaluation of the DMEF. While Mr Price presented high ratings concerning their digital stimuli and the highest respondent rating for brand loyalty, other factors influenced the effectiveness evaluation. One of these factors was the perceived value of their value

proposition. While Mr Price states that their value proposition is “*value = price + quality + fashion + convenience + experience*”, the survey respondents highlight the value of products sold by Mr Price as an area that needs improvement. In addition, when considering all of the survey responses related to the ranking and rating of all the nine fashion companies, Mr Price was not consistently positioned at the highest level of effectiveness based on the second phase of data analysis.

Cotton On is positioned between the second and third quadrants according to the evaluation of the DMEF. Price was highlighted as a key purchasing influence by the survey respondents, and this was one of the impacting factors for effectiveness. Cotton On was one of the three fashion companies that received the highest responses from Gen Z consumers who follow Cotton On. Their digital stimulus was rated highly effective by the respondents, but the neglect of unpopular social media channels such as X and Facebook was taken into consideration. From a positive interpretation, Cotton On customising their Instagram digital stimuli for their South African consumers results in higher engagement with their content among South African Gen Z consumers.

Factorie is positioned in the third quadrant according to the evaluation of the DMEF as they consistently received a neutral equivalent rating in the second data analysis phase. Although Factorie similarly has a social media presence and digital stimuli specifically catered to their South African consumer market, such as the four previously evaluated fashion companies, their evaluation does not correspond when interpreting the findings of phase 2. The findings of phase one would position Factorie as an effective fashion company in its value proposition. However, the company’s digital stimulus shows inconsistent presence across all their social media and a lack of response and interaction with their consumers on social media.

H&M is positioned in the third quadrant according to the evaluation of the DMEF. The key contributing factor to its position is the lack of engagement with its digital stimuli due to not having a South African fashion consumer-centred approach to social media content. H&M only has one South African-based social media account, which is X. Based on the study’s findings across all nine fashion companies, findings show that X was one of the least preferred social media by Gen Z respondents. Furthermore, the companies with high satisfaction ratings among the respondents were local South African brands or international brands that had digital stimuli catering for their South African customer target

market. Another contributing factor was the respondents' perception of the value that H&M offers, specifically of price and the product value offered, which required improvement.

The last three fashion companies fall in the fourth quadrant according to the evaluation of the DMEF, which represents low levels to no level of satisfaction. Legit and Zara, for contrasting reasons, are positioned between quadrants three and four. Like Factorie, Legit received either neutral equivalent ratings from the respondents or low to no engagement, as 68 stated that they were not customers of Legit. Furthermore, Legit received the highest number of responses stating that their digital marketing content requires improvement. The analysis of phase one presented Legit as a fashion company that consistently interacts and engages with its consumers. When considering the analysis of the findings from phase two, there seems to be a gap in the consumer market that Legit is not catering to with its value proposition and core marketing aspects. Legit's overall perceived value and satisfaction are not evaluated as effective according to the DMEF. The same interpretation was made of YDE. YDE consistently received low ratings of perceived value and satisfaction from the respondents.

Lastly, Zara's positioning and evaluation were determined by a lack of South African consumer-centred marketing content, which does not foster consumer interaction and engagement on social media. In addition to the observation in phase one, half (53%) of respondents highlighted that Zara requires improvement in offering affordable prices, which can be interpreted as a low consumer value perception for the products sold.

#### **6.2.4 What emerging trends should the industry adopt to maximise their marketing results with Gen Z consumers?**

This section offers interpretations of the fourth research sub-question. Based on the study's findings, attention to enhancing the interactive approach to communicating fashion product information online may offer fashion companies the opportunity to maximise the effectiveness of their marketing efforts towards Gen Z consumers. While Gen Z relies heavily on fashion product information from social media channels, they still prefer to complete their shopping journey in physical stores. This observation presents an opportunity for fashion companies to explore ways to better integrate digital fashion communication with what is promoted and sold in physical stores.

Based on applying and integrating a critical design approach such as empathic design, the study's empathic inferences towards the data and analysis allowed for innovative thinking around how better interaction could be implemented for fashion companies and their consumer market. The concept of a crowd-sourcing fashion campaign is one such innovative solution to maximising and delivering effective marketing methods for the Gen Z consumer cohort. Crowd-sourcing is understood as gaining insights, opinions, and ideas from a large group through online social media networks (Hargrave 2024). A digital fashion marketing campaign that incorporates the concept of crowd-sourcing fosters an online community where consumers could potentially give input in the design of an upcoming fashion retail collection. The fashion company leverages the benefits of consumer collaboration and engagement, and the consumer satisfaction and value perception of the fashion company is positively impacted, resulting in brand loyalty or satisfaction. Such a solution would have to be implemented with a clear understanding of the fashion company environment, the effectiveness of the value proposition, and the digital stimulus through understanding the consumer's digital hedonic response.

The study identified that influencer collaboration campaigns are a growing and emerging preference among the younger Gen Z cohort. The appeal of this marketing approach lies in its relatable, conversational brand interaction, which highlights a need for more targeted, engaging,, and culturally relevant communication strategies.

## **CHAPTER SEVEN: CONCLUSIONS AND RECOMMENDATIONS OF THE STUDY**

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Chapter 7 concludes the study and offers recommendations highlighting relevant and informed fashion marketing strategies to optimise digital fashion communication that is effectively communicated and contextually relevant to meet Gen Z consumer preferences. The study's findings support the notion that Gen Z are regarded as emerging consumers in the retail market. Chapter 1 outlined the suppositions which informed the study's premise and the gap in research investigating South African Gen Z consumer marketing communication preferences. Previous studies have identified several consumer shopping and retail preferences (PWC 2016; 2023; Lee, Rothenberg & Xu 2020). Some of these preferences include consumers wanting to interact with retailers within a more personalised connection via customer communities (PWC 2023). This study's findings support these claims through the exploration of digital fashion communication methods and media targeted at South African Gen Z consumers. Furthermore, the aim of this chapter is to offer a summary of the findings. The summary of key findings is presented according to the key areas each research question answered, further emphasising the relevance and validity of this study. Sections after the key findings are summarised and include recommendations for further research based on identified limitations and relevant findings that emanated from the data collection, analysis, and interpretation.

### **7.1 IMPACT OF SOCIAL MEDIA ON DIGITAL COMMUNICATION IN FASHION MARKETING**

The findings reveal that social media has both positive and negative impacts on digital fashion communication, particularly among South African Gen Z consumers, where the marketing of fashion products is concerned.

Platforms like Instagram and TikTok were identified as the most preferred by Gen Z for their ability to foster interactive, visually engaging, and community-driven communication. These platforms provide effective tools, such as video and image formats, which resonate with Gen Z consumer preference for promoting social networks and maintaining authentic connections.

Contrastingly, platforms such as X, formerly known as Twitter, and Facebook are the least preferred social media platforms by South African Gen Z consumers due to their lack of user interface appeal and not being popularly used by Gen Z as these platforms are seen to not share relevant information and are also perceived as outdated. Positive impacts were observed when fashion brands utilised relatable, authentic communication and actively managed their social media accounts. Although Facebook and X are not the most relevant social media accounts for Gen Z, potential consumers still engage with content on these platforms. It is therefore important that fashion companies ensure relevant and updated promotional content and engagement is reflected across all their online communication channels.

The study highlights a caution towards social media saturation, with Gen Z spending three hours or more daily on social media. In order to ensure relevance, fashion companies are advised to prioritise generating engaging, relevant, and community-centred content that aligns with Gen Z's digital preferences.

## **7.2 CRITERIA BASED ON CONSUMER PREFERENCE AND BEHAVIOURS OF GEN Z CONSUMERS FOR DIGITAL FASHION COMMUNICATION IN SOUTH AFRICA**

The findings revealed that social media platforms are the most preferred communication channel, with following retailer accounts being the primary preferred method of engagement by Gen Z. Collaborations with influencers and content creators, while not the top preference among older Gen Z respondents, significantly influence Gen Z's perceptions and behaviours. Studies have highlighted how credible and relatable influencers enhance the impact of effective digital fashion marketing approaches (Hulyk 2015; Lajnef 2023; Muturi 2024).

This study's findings also highlight the importance of locally relevant digital fashion communication. International fashion companies like Zara and H&M, which lack a South African-specific social media presence, did not receive consistently high ratings or perceptions of value by South African Gen Z consumers. In contrast, Shein's localised Instagram and TikTok accounts tailored for South African consumers resulted in higher satisfaction and loyalty ratings. These findings demonstrate that socio-cultural relevance is crucial for fashion companies to understand and apply in fostering brand loyalty among Gen Z consumers.

In addition to the key preferences, Gen Z showed positive engagement with digital content that incorporated entertainment and interactive elements, such as memes, trending music, or phrases, further reflecting their desire for relatable, engaging communication. The study also highlights the value of active engagement. In this study's findings, most of the local South African brands that respond to customer comments and queries received higher levels of positive interaction. This personal touch in digital communication enhances consumer satisfaction and strengthens brand loyalty (Naeem & Ozuem 2022).

In order for fashion companies catering to the South African Gen Z consumer to be deemed effective in their digital marketing approaches, they must adopt strategies that prioritise social media engagement, locally relevant content, and interactive, entertaining communication to meet the criteria preferred by Gen Z consumers.

### **7.3 SOCIETAL FACTORS AFFECTING FASHION PURCHASING DECISIONS OF SOUTH AFRICAN GEN Z CONSUMERS**

The findings reveal that societal factors such as price sensitivity and affordability significantly influence the purchasing decisions of South African Gen Z consumers. This factor is followed by the consumer's personal style, which makes the respondent's relationship between price and quality understandable. Price remains a primary consideration, with brands like Mr Price and Shein being rated highly for offering affordable product options. While affordability is a priority, many respondents acknowledged the relationship between price and quality, which resonated as another underlying purchasing influencing factor. Additionally, the majority of respondents shop for fashion items every two to three months, followed by Gen Z and Millennials shopping once a month.

Inclusivity in terms of body shape and size variety also emerged as a factor influencing Gen Z consumers' purchasing decisions. Respondents value brands that cater to diverse consumer needs. Fashion companies such as Legit and YDE are interpreted as companies that do not cater to diverse Gen Z consumer needs, as most Gen Z consumers of this study rated these companies with low-value consumer perception. However, while fast fashion's social and environmental impacts are recognised, fewer than half of respondents actively consider these factors in their purchasing decisions. Some respondents counterbalance this by engaging in sustainable practices, such as

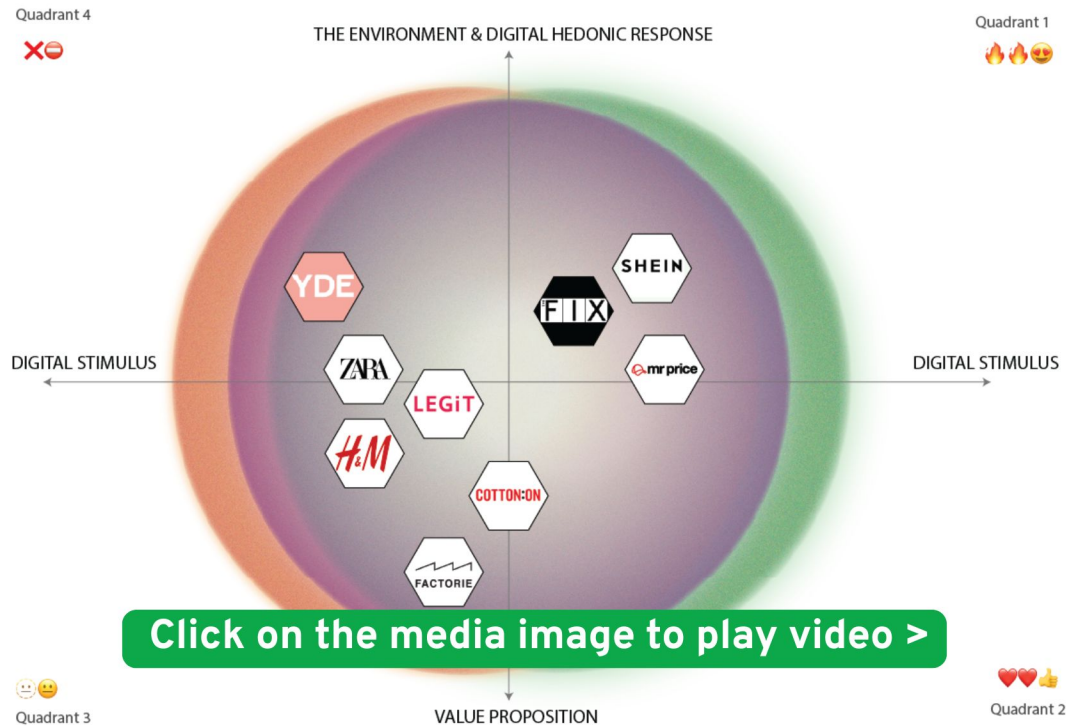
thrifting second-hand clothing via local platforms like Yaga or not shopping at any of the nine fast fashion companies selected as subjects in this study.

#### **7.4 EVALUATING THE DIGITAL MARKETING EFFECTIVENESS OF ALL NINE FASHION COMPANIES**

The study employed a netnographic analysis to analyse and interpret the data. In addition to the netnographic analysis, the study's proposed DMEF conceptual framework was crucial in deducing the findings of this study and evaluating the effectiveness of digital fashion communication to South African Gen Z consumers.

Figure 7.1 represents a time-lapse video of the final position mapping of all nine fashion companies according to the study's conceptual framework. The objective of sharing this time-lapsed video is to further emphasise the role of the researcher as an instrument immersed in the netnographic context of the study and apply key digital communication approaches such as videos as part of the explication of this study's key findings. Furthermore, this video presents a live shot of the positioning of all nine fashion companies according to the DMEF and also revisits the findings presented in Chapter 5 to ensure an accurate representation and justification of the interpretations presented in Chapter 6.

In order to further demonstrate the immersive approach supported by netnography, the video is accompanied by audio (Tyla 2024) and ensures the video duration does not exceed one minute. These incorporations and considerations are influenced by this study and previous studies highlighting the format of preferred online media content of Gen Z individuals.



**Figure 7.1: Time-lapsed Video of the Positioning of all Nine Fashion Companies**

As discussed in Chapter 6, The Fix and Shein consistently demonstrated high perceived value and satisfaction levels among the Gen Z respondents. Their digital marketing strategies, including engaging social media content and interactive digital stimuli, resonated with South African Gen Z consumers, earning them high brand loyalty ratings and satisfaction with digital fashion promotional content. Mr Price was positioned between the first and second quadrants, with its strong brand loyalty contrasted by critiques regarding the perceived value of its products and consistent ratings, placing them in the second quadrant despite high engagement levels with their digital stimuli on the reviewed social media channels.

Cotton On was in the second and third quadrants. The factors impacting their evaluation included the lack of consistent engagement and management of its company-generated digital stimuli on all social media reviewed in this study. Similarly, Factorie was positioned in the third quadrant due to inconsistent engagement and management of its digital stimuli, impacting the respondents' perceived value and satisfaction with the company.

Also positioned in the third quadrant was H&M, which lacked South African fashion consumer-centred digital stimuli.

Legit and Zara, positioned between the third and fourth quadrants, demonstrated significant gaps in their value propositions and digital strategies. Legit's neutral to negative consumer responses and high demand for digital content improvement, alongside Zara's lack of localised marketing and affordability issues, contributed to low satisfaction ratings by the survey respondents.

Lastly, YDE was positioned in the fourth quadrant, with consistently low perceived value and satisfaction ratings. The findings emphasise the importance of tailoring digital marketing strategies to resonate with South African Gen Z consumers through localised, engaging, and interactive digital stimuli while addressing crucial factors such as affordability and product value.

## **7.5 LIMITATIONS OF THIS STUDY AND RECOMMENDATIONS FOR FURTHER RESEARCH**

Some of the limitations of this study provide opportunities for further research. Although the study did not seek to explore the insights of Millennials, some (15%) of the survey responses were contributed by South African Millennials. Snowball sampling introduced a broader demographic range, allowing for comparative insights between Gen Z and other cohorts. The study's focus was Gen Z respondents aged between 18 and 28, who comprised 85% of the survey respondents. Although the study did not seek to explore other generational cohorts, including some Millennial insights, it was valuable as most of the nine fashion companies selected as data subjects also mention Generation Y as part of their target audience. Furthermore, South African youth, including individuals up to age 35, were also considered. Lastly, most selected fashion companies did not offer a distinct age range description. They kept their definition of their consumer target audience broad. This limitation could be recommended as a further study exploring the generational differences between South African Gen Z and Millennial consumers. It will also explore the micro-generations that are placed between macro generations, such as the Zennial generation or the microgeneration that is to be configured between Gen Z and Gen Alpha.

While the employed snowball sampling method may have resulted in oversampling of urban, university-attending Gen Z respondents, these groups may provide rich insight

into the perspectives of a key consumer segment, Gen Z students and urban youth. The mention of the sampling method as a limitation to the study necessitates consideration to caution when extrapolating results to all members of the generation or to the general fashion consumer market in South Africa. Future research could address this by incorporating complementary recruitment methods, such as offline engagement in non-university community settings, partnerships with youth organisations beyond tertiary education.

The study's reliance on publicly available secondary data from websites and social media platforms may not have provided a complete picture of retailers' internal strategies or consumer demographics. The analysis of the fashion companies was also restricted to a sample of nine South African fashion companies, which, while carefully selected, may not fully represent the diversity of the retail sector. Furthermore, the study acknowledges that some selected fashion companies only cater to female consumers. The findings of the survey responses did not explore the identified genders of the survey respondents, but respondents had the option to not identify their gender according to the binary male and female gender identities. A possible recommendation for further study could explore the effectiveness of fashion companies' level of inclusivity for consumers who identify as gender non-binary. Other areas of inclusivity, such as body shape and size diversity in the fashion products offered at various retailers, could yield valuable insights that ensure the fashion retail sector is cognisant and actively catering to the diverse and current consumer demographic.

The study's focus on digital stimuli and social media engagement excludes traditional marketing channels, potentially overlooking other influential factors in consumer decision-making. The survey findings revealed how some respondents still window shop as a form of fashion product research before purchasing. Other observations made by respondents related to a lack of correspondence between a fashion company's online store and physical stores. Finally, the interpretation of digital engagement, such as comments and likes, is inherently subjective and may not accurately capture the intent or sentiment of consumers. These limitations highlight areas for further exploration and the importance of the fashion consumer survey to audit and verify the empathic inferences made during the first phase of data collection and analysis.

This study's academic and theoretical contribution lies in developing and applying the study's conceptual framework, the DMEF. Recommendations for further research could explore the application of the DMEF to other sectors of the fashion industry in South Africa, such as smaller to medium-sized fashion enterprises, that aim to effectively identify and cater to their Gen Z target market. In addition, the value of applying the DMEF to other digital fashion marketing contexts lies in its objective of determining effective marketing strategies and fostering innovative solutions for digital fashion communication.

This study explored the digital communication strategy gaps in the fashion industry's marketing communication with South African Gen Z consumers. By addressing the research questions and sub-questions, the study has provided critical insights into how digital fashion communication and marketing strategies can be relevant and effectively tailored to this dynamic consumer group. The findings contribute to the existing body of knowledge on digital marketing and Gen Z consumer behaviour while offering practical recommendations for industry stakeholders. Furthermore, the findings contribute specifically to research exploring digital fashion communication and marketing strategies targeted at Gen Z consumers in South Africa. The existing body of knowledge revealed that there is not enough research done to explore this study's research area.

The study emphasises the role of social media in fashion marketing and online communication. While social media platforms offer unprecedented opportunities for engagement, brand awareness, and customer loyalty, they pose significant challenges, such as brand disloyalty and over-saturation of marketing communication. Gen Z consumers are highly discerning and seek authenticity and personalised interactions in their online social media engagements. Therefore, the effectiveness of social media as a marketing communication tool depends on how brands navigate these challenges, create meaningful connections with their consumers, and prioritise a consumer-centred approach.

## **7.6 SUMMARY**

This study addressed how to maximise emerging trends and gaps in digital fashion communication and media targeted to South African Gen Z consumers. As online and digital media and communication continue to evolve and redefine the retail landscape, the findings of this study aim to offer relevant insights into how South African fashion retailers engage with Gen Z through digital platforms and social media. The research

provided actionable insights towards effective approaches for reaching this digitally astute and socially aware consumer cohort by examining marketing strategies, digital stimuli, and consumer interactions. Additionally, the study's premise addressed a gap in the literature by investigating the specific challenges and opportunities for retailers targeting Gen Z in the South African context, a market characterised by nuanced socio-economic and cultural factors. The integration of emojis into survey questions also reflected a nuanced understanding of Gen Z's communication styles, further supported by the study's findings.

The study's proposed DMEF conceptual framework combined the empathic design approach and the digital affect and digital marketing strategy frameworks for research. Each provided valuable research theories and paradigms that assisted in unearthing data and making interpretations of key findings. The empathic design approach as a critical human-centred approach allowed for an in-depth understanding of how Gen Z engages and interacts on social media through empathic inferences. Subsequently, the data collection and observation culminated in conceptualising relevant digital marketing strategies or solutions. Previous studies done on Gen Z in the workplace or understanding Gen Z from a psychological perspective as well as digital marketing highlight Gen Z as a cohort that values personalised interaction online (Bendoni 2017; Król 2020; Munsch 2021; Naeem & Ozuem 2022; PWC 2023; Muturi 2024). With this understanding of Gen Z well-argued and established, few studies exploring the effectiveness of current digital fashion communication targeted at South African Gen Z consumers have been done.

The study identified emerging trends and gaps in digital fashion communication targeting South African Gen Z consumers. A key insight is the importance of fashion companies focussing on social media interactivity, as Gen Z heavily relies on social media for fashion product information. However, the focus on social media interaction is very important, and attention should be focused on how fashion companies can integrate their fashion consumers' shopping cycle that begins online and ends at the physical store (phygital) (PWC 2023). A streamlined fashion shopping cycle increases the consumers' perceived value and satisfaction of a brand and impacts the consumers' brand loyalty.

Using a critical design approach like empathic design, the study conceptualised innovative approaches to improve the effectiveness of digital fashion communication.

One such concept is a crowd-sourcing fashion campaign, which engages consumers by allowing them to contribute ideas for upcoming collections through social media. This strategy fosters community involvement, enhances consumer satisfaction, and strengthens brand loyalty by leveraging collaborative engagement.

Influencer collaboration also emerged as a growing preference among younger Gen Z consumers. These campaigns appeal to Gen Z's desire for relatable and conversational brand interactions, emphasising the need for targeted, engaging, and culturally relevant strategies. Addressing these trends and gaps requires a nuanced understanding of the fashion company's environment, its value proposition's effectiveness, and its target audience's digital hedonic responses. By applying these approaches, fashion companies can more effectively connect with and meet the expectations of South African Gen Z consumers.

A crucial contribution of this study is the establishment of a model for evaluating the effectiveness of digital fashion marketing strategies. By integrating theoretical insights with empirical data, the DMEF offers a framework for brands to assess and refine their digital fashion communication strategies. The DMEF is a tool for industry practitioners to develop more targeted, relevant, data-driven marketing initiatives that resonate with Gen Z consumers. The study's findings highlight the importance of the South African fashion industry to remain agile in adopting and integrating trends to stay competitive in an ever-evolving digital ecosystem.

Overall, this research contributes valuable insights into the evolving landscape of digital fashion marketing and its impact on Gen Z consumers in South Africa. The findings highlight the need for brands to adopt a consumer-centric approach, leveraging digital communication tools and strategies that align with Gen Z's expectations and values. By continuously adapting to the needs and preferences of Gen Z consumers, fashion brands can foster stronger connections, enhance brand loyalty, and drive sustainable growth in the digital era to ensure future preparedness for the potential buying and spending power that Gen Z has.

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## CHAPTER EIGHT: APPENDICES

*All the original sources of appendices can be accessed via this [Google Drive link](#)*

## Appendix A: Ethics approval letter



College of Human Sciences\_CREC

Date: 04/10/2024

Dear: Ms Kimberly Bediako

NHREC Registration # : (Rec-240816-052)

Ref #: 3129

Name: Ms Kimberly Bediako

Student #: 67122655

**Decision: Ethics Approval from 04 October 2024 to 03 October 2025**

**Researcher:** Ms Kimberly Bediako

Alpine Village, Unit 73

Randburg

67122655@mylife.unisa.ac.za 0658033540

**Supervisor:** Professor Rofhiwa Mukhudwana Mukhurf@unisa.ac.za

**Digital Natives: A Study Exploring Digital Fashion Marketing Communication Strategies for South African Generation Z Consumers**

**Qualification:** PhD (Communication)

Thank you for the application for research ethics clearance by the College of Human Sciences\_CREC for the above-mentioned research study. Ethics approval is granted for one year.

The **low-risk application** was **reviewed** by the College of Human Sciences\_CREC on **04 October 2024** in compliance with the Unisa Policy on Research Ethics and the Standard Operating Procedure on Research Ethics Risk Assessment.

The proposed research may now commence with the provisions that:

1. The researcher(s) will ensure that the research project adheres to the values and principles expressed in the UNISA Policy on Research Ethics.
2. Any adverse circumstance arising in the undertaking of the research project that is relevant to the ethicality of the study should be communicated in writing to the College of Human Sciences\_CREC.
3. The researcher(s) will conduct the study according to the methods and procedures set out in the approved application.
4. Any changes that can affect the study-related risks for the research participants, particularly in terms of assurances made with regards to the protection of participants' privacy and the confidentiality of the data, should be reported to the Committee in writing, accompanied by a progress report.

5. The researcher will ensure that the research project adheres to any applicable national legislation, professional codes of conduct, institutional guidelines and scientific standards relevant to the specific field of study. Adherence to the following South African legislation is important, if applicable: Protection of Personal Information Act, no 4 of 2013; Children's act no 38 of 2005 and the National Health Act, no 61 of 2003.
6. Only de-identified research data may be used for secondary research purposes in future on condition that the research objectives are similar to those of the original research. Secondary use of identifiable human research data requires additional ethics clearance.
7. No field work activities may continue after the expiry date (**03 October 2025**). Submission of a completed research ethics progress report will constitute an application for renewal, for Ethics Research Committee approval.

**Additional Conditions**

1. Disclosure of data to third parties is prohibited without explicit consent from Unisa.
2. De-identified data must be safely stored on password protected PCs.
3. Care should be taken by the researcher when publishing the results to protect the confidentiality and privacy of the university.
4. Adherence to the National Statement on Ethical Research and Publication practices, principle 7 referring to Social awareness, must be ensured: "Researchers and institutions must be sensitive to the potential impact of their research on society, marginal groups or individuals, and must consider these when weighing the benefits of the research against any harmful effects, with a view to minimising or avoiding the latter where possible." Unisa will not be liable for any failure to comply with this principle.

**Note**

The reference number 3129 should be clearly indicated on all forms of communication with the intended research participants, as well as with the Committee.

Kind regards,



Prof Khatija Khan  
Chair of College of Human Sciences\_CRE  
E-mail: khankb@unisa.ac.za



Professor Omwoyo Bosire Onyancha  
Executive Dean / By delegation from the Executive Dean of College of Human Sciences\_CRE  
E-mail: onyanob@unisa.ac.za

## Appendix B: Cover Letter to an Online Anonymous Web-based Survey



### Ethical clearance #: Rec-240816-052

#### COVER LETTER TO AN ONLINE ANONYMOUS WEB-BASED SURVEY

Dear Prospective participant,

You are invited to participate in a survey conducted by <Kimberly Bediako> under the supervision of <Professor Rofhiwa Mukhudwana>, an <Associate Professor> in the Department of <Communication Science> towards a <PhD> at the University of South Africa.

The survey you have received has been designed to study the < consumer preferences related to digital fashion communication related to South African fashion retailers>. You were selected to participate in this survey because <you meet the purposive sampling criteria developed for this study>. [You will not be eligible to complete the survey if you are younger than 18 years]. By completing this survey, you agree that the information you provide may be used for research purposes, including dissemination through peer-reviewed publications and conference proceedings.

It is anticipated that the information we gain from this survey will help us to <develop a conceptual model that can be applied to the marketing strategies of South African-based fashion companies to evaluate the effectiveness of the digital fashion marketing and communication methods that are currently used to target Gen Z fashion consumers>. You are, however, under no obligation to complete the survey and you can withdraw from the study prior to submitting the survey. The survey is developed to be anonymous, meaning that we will have no way of connecting the information that you provide to you personally. Consequently, you will not be able to withdraw from the study once you have clicked the send button based on the anonymous nature of the survey. If you choose to participate in this survey, it will take up no more than <10 minutes> of your time. You will not benefit from your participation as an individual, however, it is envisioned that the findings of this study will <aim to provide insights and interventions towards the digital fashion marketing and communication methods being used by South African fashion retail companies for Gen Z consumers >. We do not foresee that you will experience any negative consequences by completing the survey. The researcher undertakes to keep any information provided herein confidential, not to let it out of our



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possession and to report on the findings from the perspective of the participating group and not from the perspective of an individual.

The records will be kept for five years for audit purposes where after it will be permanently destroyed <hard copies will be shredded and electronic versions will be permanently deleted from the hard drive of the computer>. You will not be reimbursed or receive any incentives for your participation in the survey.

The research was reviewed and approved by the < Department of Communication Science College of Human Sciences\_CREC >. The primary researcher, <Kimberly Bediako>, can be contacted during office hours at <67122655@mylife.unisa.ac.za>. The study leader, <Professor Rofhiwa Mukhudwana>, can be contacted during office hours at < mukhurf@unisa.ac.za >. Should you have any questions regarding the ethical aspects of the study, you can contact the chairperson of the <CREC Integrity Advisor>, < Prof Janice Moodley - email address: moodlj@unisa.ac.za>. Alternatively, you can report any serious unethical behaviour at the University's Toll Free Hotline 0800 86 96 93.

You are making a decision whether or not to participate by continuing to the next page. You are free to withdraw from the study at any time prior to clicking the send button.



## **Appendix C: Gatekeeper Approval Letters**

Presented in this order:

1. IIE Vega
2. Inscape
3. University of Johannesburg Faculty of Arts Design and Architecture



Reference: R.15975 [RPGS04]  
Enquiries: [research@iie.ac.za](mailto:research@iie.ac.za)

19 November 2024



**Letter of Institutional Consent**



Initials and surname:	K Bediako
Institution Registered at:	UNISA
Qualification:	PhD (Communication)
Title of study/paper:	Digital Natives: A Study Exploring Digital Fashion Marketing Communication Strategies for South African Generation Z Consumers.



Dear Kimberly,

We are pleased to inform you that the IIE Ethics Committee has reviewed and provided consent to utilise IIE staff, students, or artefacts to complete your research project entitled: "Digital Natives: A Study Exploring Digital Fashion Marketing Communication Strategies for South African Generation Z Consumers."



The following conditions are the standard requirements attached to the approval of all applications to conduct research involving human participants:

- Approval will be for a period of two (2) years, starting from the date of approval.
- You should notify the IIE Ethics Committee regarding any alteration to the approved project.
- You should notify the IIE Ethics Committee in the event of any adverse effects on participants or of any unforeseen development that might compromise the ethical integrity of your research project.
- The researcher(s) will need to obtain informed consent in writing from the participants/ respondents in their sample if the study is not anonymous.
- A copy of this letter must be forwarded to the relevant person(s) at the campus/es that would be involved in this research study.
- Research must be conducted in such a way that the normal programme and operations of the campus / office is not interrupted.
- A report and a copy of any published outputs should be submitted to the IIE Ethics Committee upon the completion of the project.
- You are required to uphold the IIE's Ethics stance as described in the Research and Postgraduate Studies Policy (IIE007). The policy is available on the institutional website.

on behalf of The IIE Ethics Committee

Dr Reza Hosseini  
Deputy Dean: Research and Postgraduate Studies  
The Independent Institute of Education



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28th October 2024

Mrs Kimberly Bediako,

Dear Kimberly,

Thank you for your application for permission to conduct research first received on the 16th of October 2024, for your PhD Study with title "Digital natives: A Study Exploring Digital Fashion Marketing Communication Strategies for South African Generation Z Consumers".

Your application was considered by members of the Research Committee between the 17 - 28th October 2024 and approved. The Ethical clearance number for this research study is **IEG28102024KB**.

The Committee wishes you success with your research.

Regards

Peter Harrison  
Postgraduate Academic Manager

INS  
SCAPE



FACULTY OF ART, DESIGN AND ARCHITECTURE

Staff number: 720050831

APPROVAL OF RESEARCH ETHICS

Dear Ms K Bediako

Title of study:

**DIGITAL NATIVES: A STUDY EXPLORING DIGITAL FASHION MARKETING COMMUNICATION STRATEGIES FOR SOUTH AFRICAN GENERATION Z CONSUMERS.**

The Application for clearance of Research Ethics was reviewed at a Faculty Higher Degrees Committee meeting held on 20 November 2024, and supported by the members of the committee.

The Faculty Higher Degrees Committee has decided to:

Accept as is	X
Accept with comments or concerns conveyed to candidate	
Re-submit with concerns conveyed to candidate	
Severe concerns regarding the suitability/viability of the proposed research	

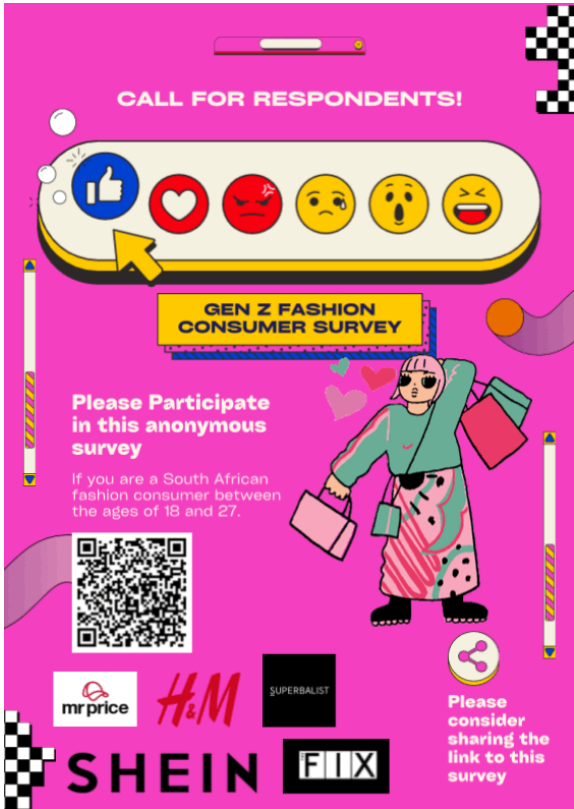
Sincerely,

Ms A Maritz

Secretariat: FACULTY HIGHER DEGREES COMMITTEE

03 March 2023

Appendix D: Survey Call for Participation Posters



Why you so quiet? What's on your mind?



CALL FOR RESPONDENTS!

**GEN Z FASHION CONSUMER SURVEY**

**Please Participate in this anonymous survey**

If you are a South African fashion consumer between the ages of 18 and 27.

Please consider sharing the link to this survey

CALL FOR RESPONDENTS!

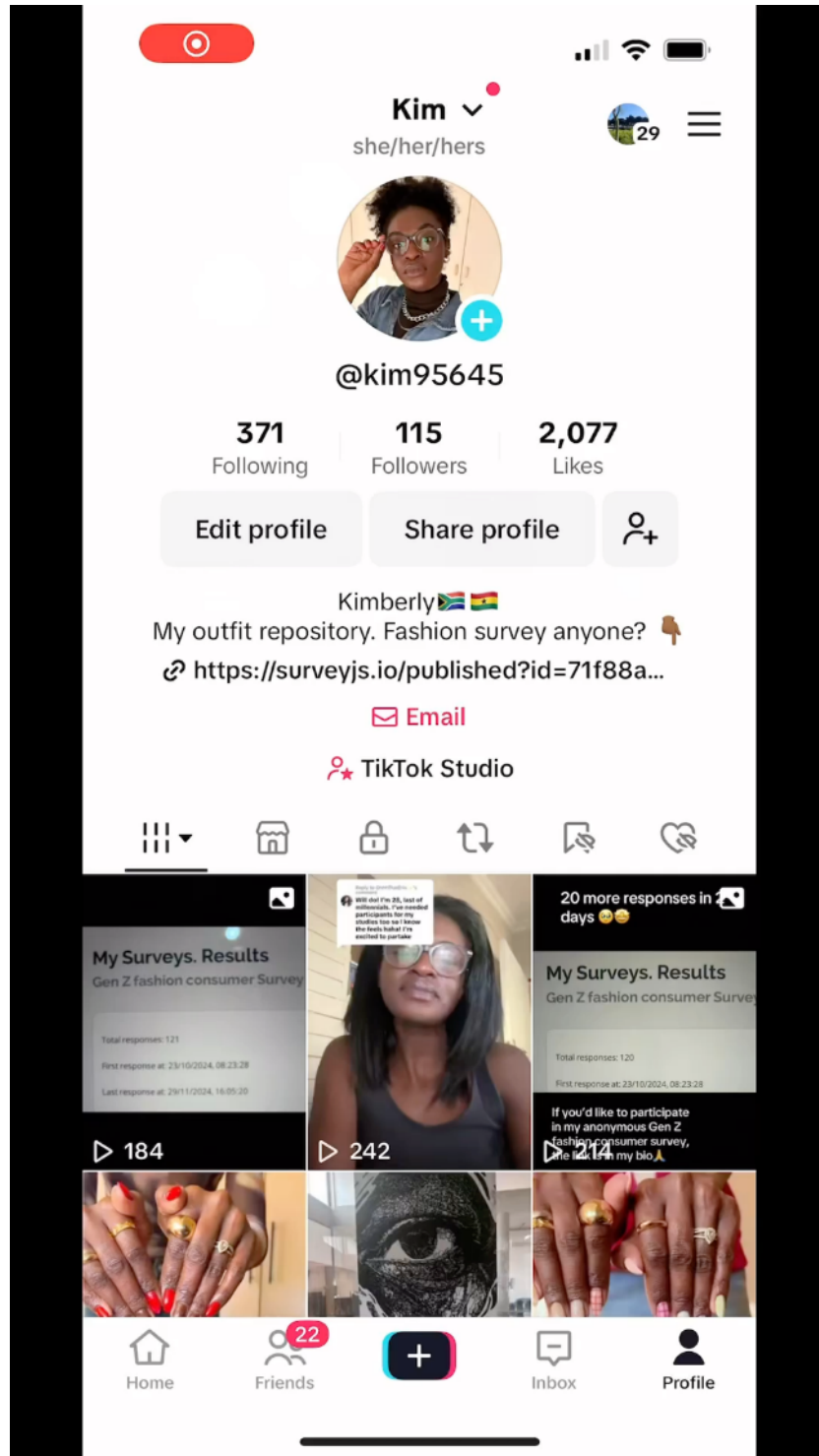
**GEN Z FASHION CONSUMER SURVEY**

**Please Participate in this anonymous survey**

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Please consider sharing the link to this survey

Appendix E: Survey Demonstration Video Shared on Social Media



Video URL

**Appendix F: Survey Results From Survey js**

Access the Original Survey results [here](#)