

HSA | PR

An HSA PR Survey
Report on the Perspectives,
Challenges and Growth
Opportunities in the
Fashion Industry of Ghana's
Creative Sector

Prepared for:

Future Research Efforts
March 23, 2023

Abs- tract

A comprehensive survey report on the fashion industry, in the creative sector of Ghana.

The report highlights the growth potential of the industry, sheds light on its challenges and presents an HSA PR perspective on the way forward.

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About HSA PR

Who We Are

HSA PR is a premier Public Relations and Communications firm that specializes in capturing the essence of brands, personalities, organizations, and entities. We have supported corporations, educational institutions, governments, politicians, and executives with our services, with a focus on Ghana and the African Continent. Collectively, we have 20-plus years of experience in Public Relations, Strategic Communications, Crisis and Reputation Management, and Strategic Advisory services.

What We Do

- Communication Strategy and Campaigns
- Corporate Communications
- Crisis and Reputation Management
- Events Ideation
- Government Relations
- Image Shaping
- Media Relations
- Public Affairs
- Stakeholder Engagement
- Voice-Overs

Sample Representations

Over the past decade, we have assisted several multinationals, governments, educational institutions, politicians, executives and individuals regarding their most critical strategies. Our work in the Ghanaian fashion industry has included the following:

Board of Fashion Ghana

We assisted with the formation of, and served as Board Advisor and Public Relations Director for, the Board of Fashion Ghana, where we worked to increase visibility of emerging Ghanaian fashion brands.

*Radford
University*

We curated seminar classes and conducted workshops on Public Relations and Branding to final year design students at Radford University, Ghana – the first university in Ghana to offer a fashion degree program; assisted Radford University with their graduate fashion show for 3 consecutive years.

Bello Edu

We managed board activities and provided guidance on marketing strategy and brand positioning of Bello Edu, a contemporary Ghanaian fashion brand.

*Ghana Fashion &
Design Week*

We led Public Relations and Marketing efforts and also facilitated seminars and workshops for Ghana Fashion & Design Week.

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1.0 Executive Summary

Objective of the Survey

On the 16th of February 2023, HSA PR launched a survey, following its very successful in-person and virtual Fashion Masterclass session at the Kempinski Hotel Gold Coast City in Accra.

The goal of the survey was two-fold: firstly, to get a better grasp of the current state of the Creative Sector, specifically the Fashion industry, in Ghana and its challenges; and secondly, to understand how HSA PR can help stakeholders grow their presence, to take advantage of the untapped market opportunities in the sector, and contribute enormously to the Gross Domestic Product ("GDP") of Ghana. Both goals were specific to the context of the survey.

The survey was made available to all participants at the session. Every voice mattered, and the more information and diversity of responses we received, the more realistic the results were. The survey was designed to be open-ended and to allow for extensive comments. None of the questions were mandatory.

There were several multiple-choice questions and a fair number of open-ended questions with room for comments.

The purpose of this Report is to share the insightful data HSA PR has received from the survey.

Key Findings

A survey analysis was performed on the multiple-choice questions. The aim of the analysis was to obtain a Likert Scale, which is a single sentiment score/response to all the questions, representative of the total cohort of participants.

The overall response, per the Likert Scale, was "AGREE", and buttressed the general sentiment among industry stakeholders and HSA PR regarding the state of Ghana's Fashion Industry, which we believe faces a number of challenges that we should work collectively to overcome.

Conclusion

The Creative Sector has its challenges, though not unsurmountable. Key among these challenges are:

- 1 Foreign manufacturers taking the roles of mass production of quality fashion items from SMEs, at very reasonable costs.
- 2 SMEs finding difficulty in securing financing from lenders, who require substantive premium interest rates.
- 3 At current small scales, most lenders shy away from working with SMEs in Ghana. They prefer to work with the larger companies, where they could earn greater fees and returns.

The above three points emphasize a strong need for access to scaling funds or low-cost financing if the sector is to realize its full potential.

It is evident from the findings that there needs to be a drive to improve the state of affairs. This most likely will require the engagement of a local partner such as HSA PR to champion these efforts.

2.0 Fashion In Ghana

Ghana is a democratic country in West Africa with a population of roughly thirty-three million people. Ghana has a relatively inexpensive labor force and is blessed with natural resources. Its climate is tropical and generally very warm, with seasonal variations of rainfall and dry weather. Dressing styles and fabric types are thus heavily influenced by the warm climate it experiences all year-round.

The Fashion industry in Ghana is a largely untapped market, and not without evidence. Almost at the level of basic necessities like food, clothing and shelter, the importance Ghanaians place on Fashion, consciously or subconsciously, is remarkable. "You are what you wear" is a slogan which manifests itself very much in Ghana. As such, people both young and old go to great lengths to get the best fashion items and keep up with new trends.



Source: HSA PR

According to an African Association of Entrepreneurs report:

"Fashion is one of the upcoming businesses that have the potential to dominate the world. Fashion is not only about what you wear; it affects your attitude and personality. It has the power to make you feel empowered. In today's world, the inclusivity of countries and regions in the fashion industry is an issue that has to be addressed. Ghana, a country, rich in culture and tradition, has been playing a major role in tackling this issue. Ghana is a steadily growing consumer and producer in the fashion industry. The country is blessed with diverse ethnic groups, each with its own unique culture and way of life.

Fashion is a social phenomenon of significant importance. In some ways, fashion helps depict personality through visual representation. It is a form of self-expression. It can be considered as art, a function, a necessity, and an expression. It is something that gives you a feeling of power and control. Shiona Turini, a freelance stylist, once said, "Fashion is about storytelling through clothing; it's about the stories behind them and the ones you create around them. It's a cultural influence, backstory, or intellectual touchpoint that you can trace back to what you're wearing. We use it to escape the mundane, to embrace and celebrate tradition. It's about a sense of history and pride, and it embodies a greater sense of purpose than just a garment tossed on to cover bodies."

Ghana has always been fashion-forward. Even though there has been a considerable western influence in the field of fashion, the country has always tried to stay true to its authentic style.

Due to the absence of written documentation of the history of fashion in Ghana, the history of fashion is only spoken about. The history of fashion dates back to pre-colonial times. The development of fashion started when colonials introduced clothes with prints. The country has played a major role in influencing fashion in today's world. The use of bold colors and a variety of fabrics is what makes their designs and style stand out.

Fashion in Ghana

People in Ghana often dress in their traditional style despite western influence. Their clothes are mostly hand made. They are hand-woven, hand-dyed, and hand-sewn by professionals. One of the most widespread methods of production is weaving. Locals used wooden handlooms to produce intricate patterns. Rafla fiber, which was obtained from a type of African Palm tree, was used for this. Ghanaians still use the method of weaving to produce their traditional clothes, Gonja and Kente.

Ghanaians prefer sturdy fabrics that are rich in color and detail. Kente, the traditional form of clothing made by the Akan people, is still worn today. Kaba and Slit are popular among women. This consists of a long wrap skirt called the Slit and a top called Kaba. This customary garment is a very symbolic outfit as it is strongly associated with our Ghanaian ladies. Men wear a smock. A smock is a top which is usually designed with traditional symbols.

The older generation tends to wear more traditional clothes, while the younger generation tends to wear western clothes. The foreign influence has majorly impacted Ghana in recent times. As the youth preferred foreign and imported clothes, the sales of locally made clothes started deteriorating. Most people prefer imported clothes which were owned by major selling brands in the world.

The fashion industry in Ghana has experienced numerous challenges but has remained true to their traditional designs and delivering these in runways and fashion events. The industry has provided the world with some of the most influential fabrics sold. With African prints fabric getting exposure around the world, we have seen the rise in more Ghanaian designers doing well in the industry. The traditional fiber that was used for making only Slit and Kaba is now being used to make dresses for daily use.

While Ghana's style industry is increasing global acknowledgment, it definitely imports more clothes than it sends out. Around 60% of Ghanaians wear second-hand garments imported from Europe and the United States. People prefer to purchase second-hand dresses, often matched with pieces of clothing with poor fit. Poor-fitting and quality of clothing made locally are among the major issues bedeviling the local fashion industry.

Fashion brands in Ghana and the Impact of foreign brands

Due to the ingenuity of local fashion designers who are fearlessly fashioning African fabrics in western styles, the clothes worn in Ghana have a broader and international appeal. But the Ghanaian dress is simply western-style translated into African print. Many renowned fashion designers hail from Ghana. These brands have made a huge impact on the fashion industry in the world. Some of the fashion brands who have made their mark on a global scale are April Rust, Atto Tetteh, Denkyi, Duaba Serwa, Citizins, and Virgil Abloh."

Source: <https://aaeafrica.org/ghana/fashion-industry-in-ghana/>

3.0 Introduction And Rationale for The Survey

This survey is part of HSA PR's long-standing efforts to contribute to the growth and exposure of small and medium-sized enterprises ("SMEs") in the Fashion and other related industries of Ghana.

On the 16th of February 2023, HSA PR launched a survey following its in-person MasterClass on Communicating the Essence Of your Brand: How to Craft a Compelling Story and Create Visibility that will Lead to Brand Recognition and Patronage, at the Kempinski Hotel Gold Coast City in Accra, Ghana. This was followed by virtual sessions on the 21st and 23rd of February where communication strategies of brands were vetted and finalized.

The running time of the survey was post-event, on 16th February 2023 only. There were 22 responses, translating to a completion rate of 100%.

The goal of the survey was two-fold. First, to get a better grasp of the current state of the Fashion Industry in Ghana and its challenges, and second, to understand how stakeholders can grow their presence, take advantage of the untapped market opportunities in the sector, and contribute enormously to the Gross Domestic Product ("GDP") of Ghana.

The rationale for the survey was, among other things, to get varying perspectives from industry players, in order to validate the general notions and, in certain instances, seek to buttress HSA PR's own opinion and sentiment on the prospects of the Fashion industry.

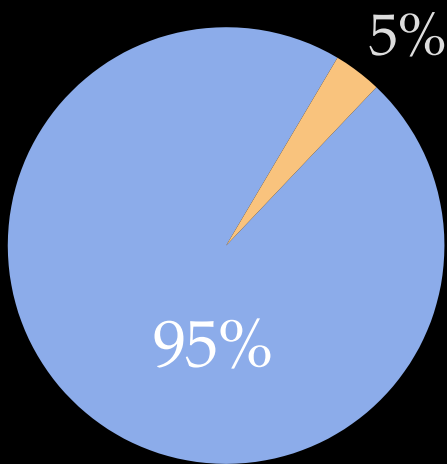
The hope is that this report will provide valuable insights, and also serve as a resource for future research efforts globally.

Aside from providing results and analysis on the survey, this report also provides information on:

- An estimate of the current market size of the Fashion industry in Ghana.
- The product segmentation within the Fashion and related industries.
- The market potential of the Fashion industry in Ghana.
- The outlook of the current market situation and future outlook of the market to 2027.
- The current sentiment in the Fashion industry.
- How the growth of the Fashion industry and the Creative Sector, in general, can contribute to GDP and employment growth in the country.
- The strategy on going forward, and how any planned initiatives in the region can be achieved.

Survey Participants

Participant Business Domain Breakdown



- Fashion
- Craft

Source: Anovel Advisory

A total of twenty-two individuals participated in the survey. Normal surveys require sample sizes which are not too small, to enable more precision in the results. For this survey, though a seemingly smaller size was used, almost all the participants (21 out of the 22 participants) operated in the Fashion industry (they held the roles of Fashion Designers, Creative Directors, Proprietors and other related roles). This made the cohort an appropriate sample size, and very strong in quality, for the survey. There was only one participant (participant L, a sculptor) who did not ply their trade in the Fashion industry, though their trade was considered to be within the Creative Sector.

Participant ID	Business Domain
A	Fashion
B	Fashion
C	Fashion
D	Fashion
E	Fashion
F	Fashion
G	Fashion
H	Fashion
I	Fashion
J	Fashion
K	Fashion
L	Craft
M	Fashion
N	Fashion
O	Fashion
P	Fashion
Q	Fashion
R	Fashion
S	Fashion
T	Fashion
u	Fashion
V	Fashion



Source: HSA PR

5.0 Key Findings & Outcomes

Critical issues affecting the industry were analyzed from responses of participants to three key questions in the survey. These key questions were carefully crafted to elicit responses to matters we believed were critical to the success and growth of the industry.

Methodology

Participants were provided with an internet URL address to access the survey questions. A section of the survey elicited responses in multiple choice format, where the participants could choose from five different answers in the questionnaire (Strongly Disagree, Disagree, Neutral, Agree and Strongly Agree). These style questions were the type selected for analysis.

The per participant responses were tabulated and analyzed after running them through filtration checks to eliminate any outliers. Being the group that participated in the Masterclass session, and as a result of that, a very focused group, the sample population (the participants) used for the study was inherently reliable.

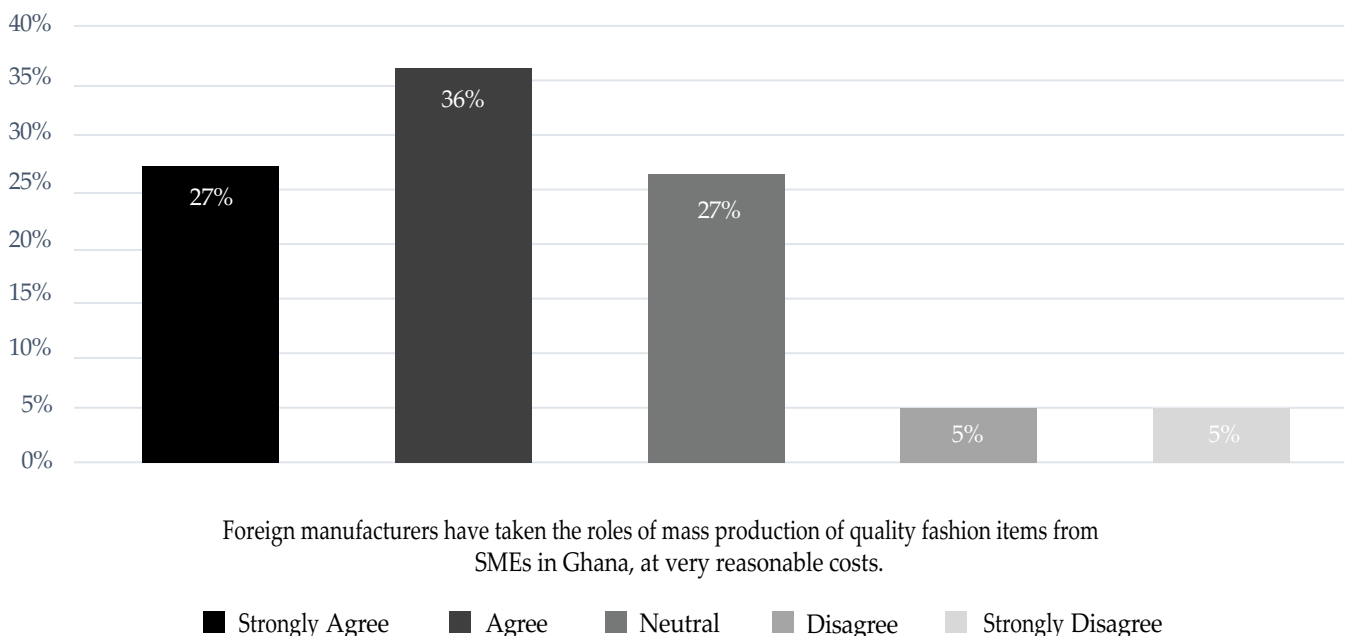
This resulted in a remarkable zero outliers in the data cleaning exercise for the analysis.

The results of the survey are as follows.

Outcome

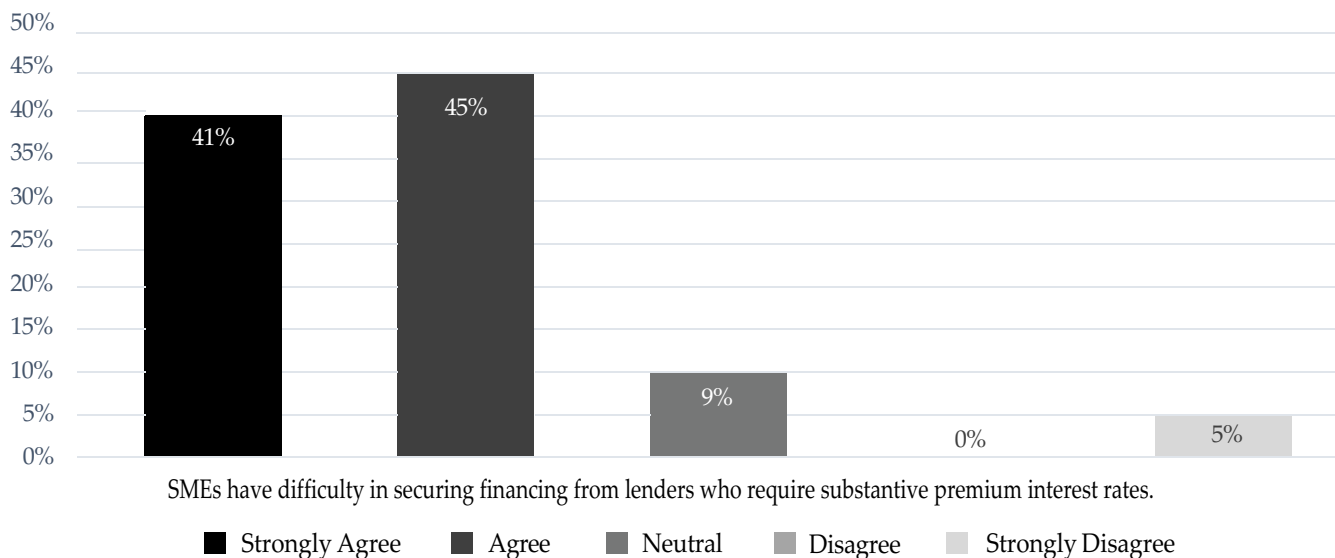
Question 1: When asked if foreign manufacturers have taken the roles of mass production of quality fashion items from SMEs in Ghana, at very reasonable costs, the top answer was "Agree", and reflected 36% of the participant count. On an even positive note, those that selected "Strongly Agree" were 27% of the total number of participants. Those who selected "Neutral" were 27% of the total participant count, leaving only 10% of participants in the "Disagree" or "Strongly Disagree" categories. This led to a very strong positive sentiment, where a total of 63% provided answers in line with HSA PR's sentiment that foreign manufacturers have largely taken the roles of mass production of quality fashion items from SMEs in Ghana.

Survey Data Analysis: Q1



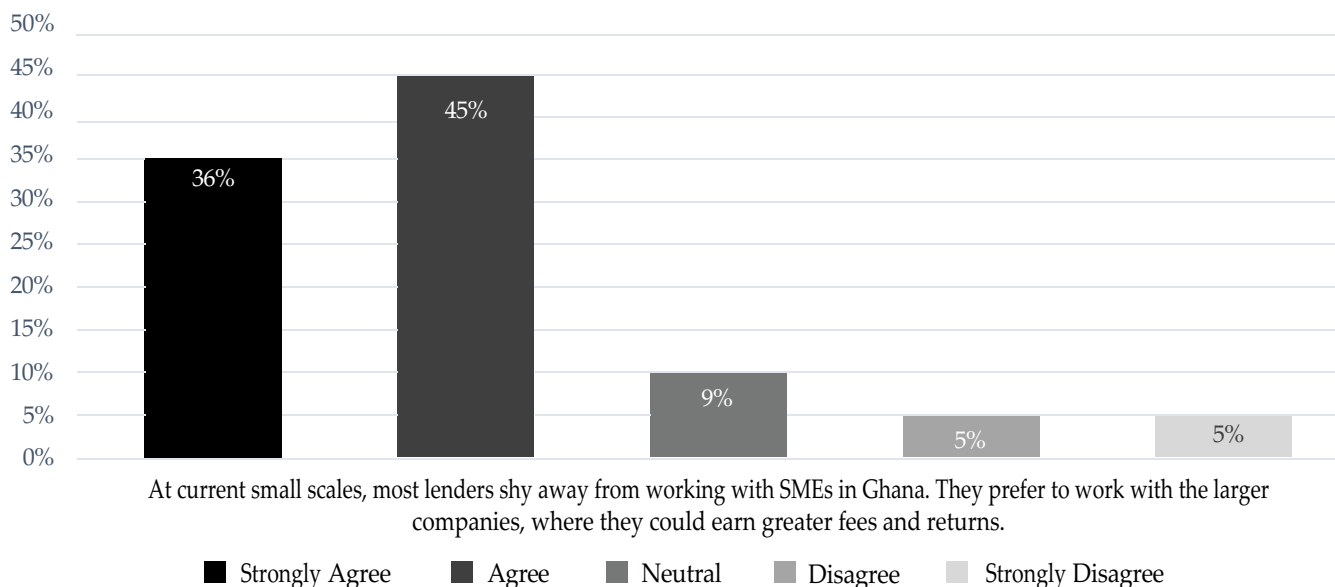
Question 2: When asked if SMEs have difficulty in securing financing from lenders who require substantive premium interest rates, the top answer was "Agree", and reflected 45% of the participant count. On an even more positive note, those that selected "Strongly Agree" were 41% of the total number of participants. Those who selected "Neutral" were 9% of the total participant count, leaving only 5% of participants in the "Disagree" or "Strongly Disagree" categories. This led to a very strong sentiment, where a total of 86% provided answers in line with HSA PR's view that SMEs have difficulty in securing financing from lenders who require substantive premium interest rates.

Survey Data Analysis: Q2



Question 3: When asked if, at current small scales, most lenders shy away from working with SMEs in Ghana, but rather prefer to work with the larger companies, where they could earn greater fees and returns, the top answer was "Agree", and reflected 45% of the participant count. On an even positive note, those that selected "Strongly Agree" were 36% of the total number of participants. Those who selected "Neutral" were 9% of the total participant count, leaving only 10% of participants in the "Disagree" or "Strongly Disagree" categories. This led to a very strong positive sentiment, where a total of 81% provided answers in line with HSA PR's sentiment that at current small scales, most lenders shy away from working with SMEs in Ghana, but rather prefer to work with the larger companies, where they could earn greater fees and returns.

Survey Data Analysis: Q3



Overall Response

The aim of the analysis was to obtain a Likert Scale, which is a single sentiment score/response, representative of the total cohort of participants (see section I of Appendix).

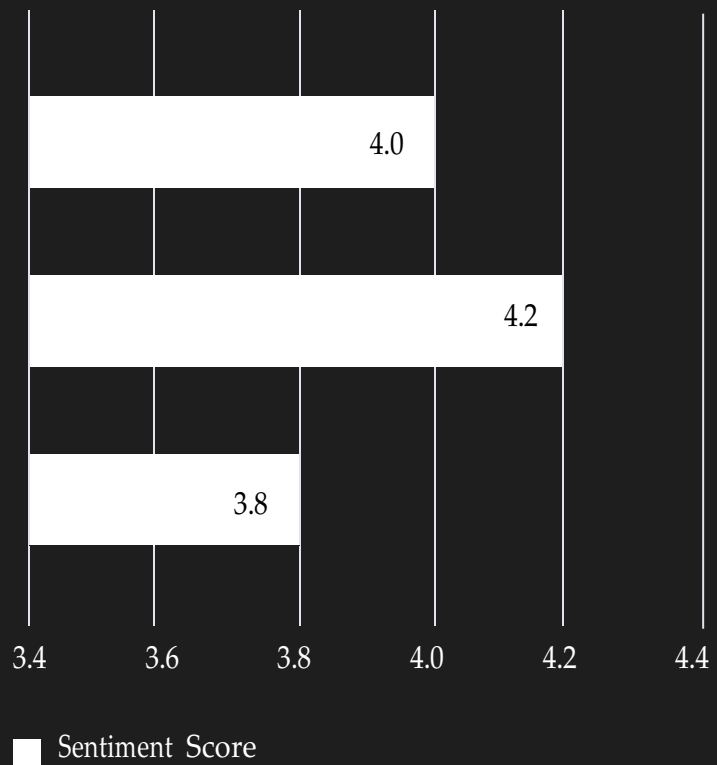
The overall response, per the Likert Scale, was "AGREE", and buttressed the general sentiment among industry stakeholders and also HSA PR's perception of the state of the Ghanaian Fashion Industry.

Likert Items

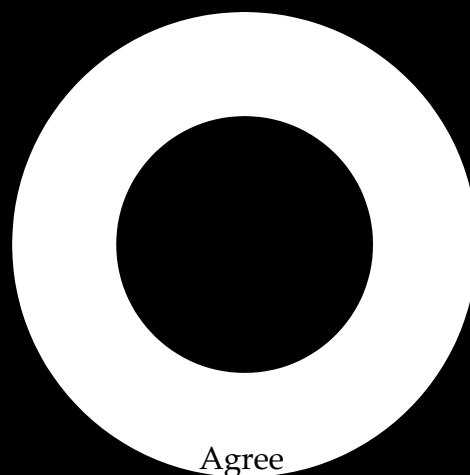
At current small scales, most lenders shy away from working with SMEs in Ghana. They prefer to work with the larger companies, where they could earn greater fees and returns.

SMEs have difficulty in securing financing from lenders who require substantive premium interest rates.

Foreign manufacturers have taken the roles of mass production of quality fashion items from SMEs in Ghana, at very reasonable costs.



Likert Scale



6.0 Additional Insights

Below is a cross-section of responses received from the participants to additional survey questions.

Question: What major challenges are you facing within the industry?

Participant U Response:

"Lack of investment".

Participant O Response:

"Scaling up, access to raw materials and finances".

Participant D Response:

"Finding brands in Ghana that produce authentic everyday jewelry".

Participant H Response:

"Marketing, production, finance".

Participant N Response:

"Capacity. The business needs to expand in relation to capacity because the demand is out there".

Question: What would be the best way to assist you? (i.e., resources, information, etc.)

Participant J Response:

"Resources for expansion".

Participant K Response:

"Getting investors to upscale into large scale production /manufacturing".

Participant Q Response:

"Business relations & fabric sourcing".

Participant U Response:

"I can be exposed and recommended to some potential investors and foreign manufacturers".

Participant B Response:

"Resources, Machinery and Information to help the business of fashion".

Question: What do you think would benefit the Ghanaian Fashion Industry?

Participant I Response:

"Investors".

Participant K Response:

"Production of materials here to reduce cost of materials".

Participant M Response:

"If we are able to produce our own materials".

Participant N Response:

"The industry needs investment, both capital and human resource".

Participant R Response:

"Massive financial investment and talent scouting".

Question: What are the key insights you gained from the Masterclass?

Participant K Response:

"Creating a brand story".

Participant T Response:

"Quality control of your products.

Pricing of products.

How to deal with existing, potential and aspirational customers or audience".

Participant O Response:

"Positioning my brand right.

Pricing right from the beginning".

Participant N Response:

"The importance of focusing on the business of fashion. Handling fashion as a business will help you scale up and make your business profitable".

Participant V Response:

"Identifying the core values for my brand and making sure they align with the brand; How to access, reach and keep my target audience; How to price products right; The importance of developing and maintaining communication with Clients".

Question: In what capacity (if any) did the COVID-19 pandemic affect your business? Do you wish you had in place digital channels of distribution?

Participant B Response:

"Covid was both a blessing and a curse. yes, business was disrupted but it helped us transform the way we did business and enabled us to take advantage of going digital".

Participant F Response:

"Yes, I wish my online presence was stronger".

Participant H Response:

"We didn't have an e-commerce website when COVID was at its peak and that sort of restricted our sales. We also had to close down our physical sales channel. It was really a frustrating period".

Participant J Response:

"We had to close our flagship store for a period. Sales and production fell by 65%".

Participant P Response:

"It didn't at all. We actually launched in 2020. When it was at its peak. Instagram has been a blessing to our brand".

7.0 Concluding Remarks: An HSA PR Perspective

Over-reliance by some West African states on crude oil and cocoa exports has proven not to be very prudent, given recent steep falls in the price of crude oil and the production capacity of cocoa. This has impacted their economies heavily, in terms of revenue income and GDP growth. These nations are now seeking to diversify into other areas, to provide hedges against, and reduce the over-reliance on, their chief export products. There is a pressing need to develop other sectors if macroeconomic stability is to be achieved. There are several sectors which remain untapped and are now considered lucrative and alternative investment areas for economic growth.

One of these untapped areas is the Creative Sector. This sector has its challenges, though not unsurmountable. Key among these challenges are:

- Foreign manufacturers taking the roles of mass production of quality fashion items from SMEs at very reasonable costs.
- SMEs finding difficulty in securing financing from lenders who require substantive collateral and lend at high premium interest rates.
- At current small scales, most lenders shy away from working with SMEs in Ghana. They prefer to work with larger companies since they can earn greater fees and return.

The above three points emphasize a strong need for access to scaling funds or low-cost financing, if the sector is to realize its full potential.

From an empirical analysis carried out by Anovel Advisory, a business advisory firm, to estimate the potential market size of the apparel industry in these countries being three of the largest economies in the ECOWAS region of the Sub-Saharan Africa,

ECOWAS region of the Sub-Saharan Africa, a quantitative estimate of the market potential was determined. The results from the study are as described below:

- From the study, the projected market potential for Ghana, Nigeria and Cote D'Ivoire in 2023 is \$10.9 billion.
- Out of the \$10.9 billion, the market potential for Ghana is \$1.6 billion, compared to a 2023 projected revenue for the apparel industry in Ghana of about \$130 million, as per [statista.com](https://www.statista.com), leaving \$1.47 billion as untapped potential in Ghana for 2023.

HSA PR believes this number of \$1.47 billion may even be on the conservative side, given the ever-growing global demand for Made-in-Africa products. To effectively compete with foreign manufacturers, intentional investment is imperative if export-oriented companies in the sector are to attain similar levels of the quality and standards required on the international markets.

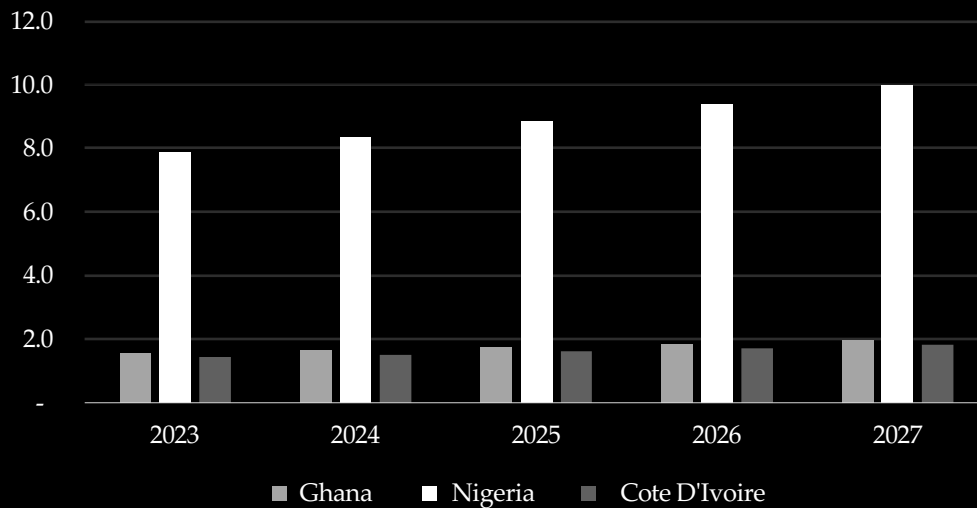
In addition, innovation through digital transformation will be a game changer. Digital transformation will help reengineer existing distribution channels for SMEs, slash their costs, make them more competitive, improve each step of their value chain and improve their visibility.

To buttress a digital transformation drive, HSA PR also believes that business activity post Covid-19 would largely be driven in "contactless" mode, moving away from brick-and-mortar, thus driving up e-commerce channels in a very big way. As a result, there will be a huge need for funding for the development and setup of warehousing facilities, and a reduction in the need for large retail spaces.

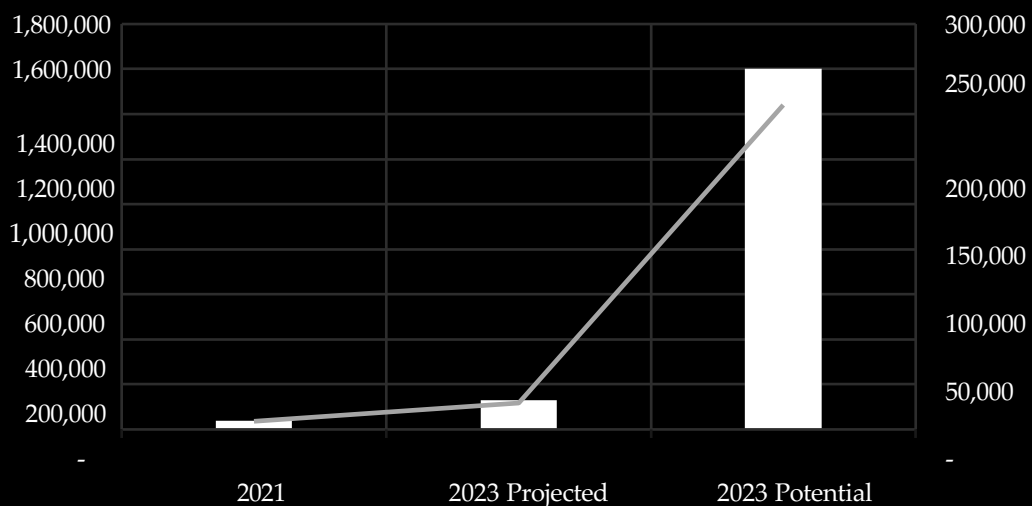
Market Potential by Year (in billion USD)					
Country	2023	2024	2025	2026	2027
Ghana	1.6	1.6	1.7	1.9	2.0
Nigeria	7.9	8.3	8.9	9.4	10.0
Cote D'Ivoire	1.4	1.5	1.6	1.7	1.8
Total	10.9	11.5	2.2	13.0	13.8

Source: Anovel Advisory

Market Potential by Year (in billion USD)



POTENTIAL CONTRIBUTION TO GDP AND EMPLOYMENT
GHANA'S FASHION INDUSTRY



Going Forward

From the findings, it is evident that the fashion industry in Ghana needs to be scaled up through the injection of funds into the industry. There is also a need for better access to funding to revamp the industry. This drive will require the engagement of a local partner such as HSA PR to champion these efforts. We believe these efforts will require the following (not exhaustive):

1. Creating an audit and standards checklist against audit standards, for SMEs, and developing a comprehensive database of SMEs in the sector, broken down by industry and size, in terms of annual revenue.
2. Assessing SMEs against the standards in 1. above.
3. Helping local businesses determine their eligibility for funding.
4. Identifying the right types of funding.
5. Performing preliminary Due Diligence on local SMEs that may need funding for expansion of their operations.
6. Providing training and Masterclass sessions to SMEs on Public Relations and the power of storytelling to create visibility for their brands. On a scale of 1 to 10, the average score was 9.6, when participants were asked how likely they were to recommend HSA PR's Masterclass.
7. Preliminary reviews of business plans for funding.
8. Helping local SMEs learn about the reporting requirements they would need to be in compliance with, if awarded funding, and understanding the funding policies.
9. Advising local SMEs on how to implement short-term initiatives for better Quality Management.
10. Empowering SMEs to take better control of their businesses through training on Financial Statements.
11. Conducting Market Research exercises annually, to get critical feedback on the effectiveness of any implemented efforts or industry programs.

Appendix

I - Survey Analysis and Likert Scale

	Question 1:	Question 2:	Question 3:
Participant ID	Foreign manufacturers have taken the roles of mass production of quality fashion items from SMEs in Ghana, at very reasonable Costs	SMEs have difficulty in securing financing from lenders who require substantive premium interest rates	At current small scales, most lenders shy away from working with SMEs in Ghana. They prefer to work with the larger companies, where they could earn greater fees and returns
A	Neutral	Strongly agree	Strongly agree
B	Strongly agree	Strongly agree	Strongly agree
C	Strongly agree	Strongly agree	Strongly agree
D	Strongly agree	Agree	Agree
E	Strongly disagree	Strongly disagree	Strongly disagree
F	Agree	Neutral	Neutral
G	Neutral	Agree	Agree
H	Disagree	Strongly agree	Strongly agree
I	Neutral	Strongly agree	Strongly agree
	Agree	Agree	Disagree
K	Agree	Agree	Agree
L	Neutral	Neutral	Neutral
M	Neutral	Agree	Agree
N	Strongly agree	Strongly agree	Agree
O	Strongly agree	Strongly agree	Strongly agree

P	Agree	Strongly agree	Strongly agree
Q	Agree	Agree	Agree
R	Agree	Agree	Agree
S	Agree	Agree	Agree
T	Agree	Agree	Agree
u	Strongly agree	Strongly agree	Strongly agree
V	Neutral	Agree	Agree
Blank	0	0	0
Non-Blank	22	22	22
Total	22	22	22
Strongly Agree	6	9	8
Agree	8	10	10
Neutral	6	2	2
Disagree	1	0	1
Strongly Disagree	1	1	1
Total	22	22	22
Strongly Agree	27%	41%	36%
Agree	36%	45%	45%
Neutral	27%	9%	9%
Disagree	5%	0%	5%
Strongly Disagree	5%	5%	5%
Total	100%	100%	100%

Likert Scale			
Question 1			
	Numerical Value	Responses	Total
Strongly Agree	5	6	30
Agree	4	8	32
Neutral	3	6	18
Disagree	2	1	2
Strongly Disagree	1	1	1
Total		22	83
Sentiment Score:			3.8
Question 2			
	Numerical Value	Responses	Total
Strongly Agree	5	9	45
Agree	4	10	40
Neutral	3	2	6
Disagree	2	0	0
Strongly Disagree	1	1	1
Total		22	92
Sentiment Score:			4.2

Question 3			
	Numerical Value	Responses	Total
Strongly Agree	5	8	40
Agree	4	10	40
Neutral	3	2	6
Disagree	2	1	2
Strongly Disagree	1	1	1
Total		22	89
		Sentiment Score:	4.0
		Likert Scale:	$(3.8+4.2+4.0)/3 = 4$ (Agree)

II - Sample Designs from Contemporary Ghanaian Fashion Houses



Source: HSA PR



Source: HSA PR



Source: HSA PR