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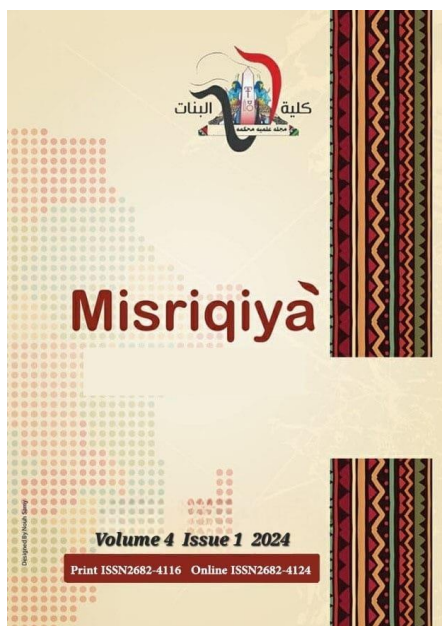


## Miṣriqiyyā

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## Exploring Conceptual Metaphors in American and Egyptian Jokes During the Coronavirus Pandemic: A Comparative Study

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### Abstract

This study examines the differences between Egyptian and American jokes about the coronavirus and quarantine time during the 2020 pandemic. It uses the Semantic Script theory and Conceptual Metaphor theory to analyze the conceptual metaphors used in both cultures. The study focuses on the types of metaphors employed, script violations, humor techniques, cultural factors affecting perception, and shared fears and challenges. Moreover, it attempts to answer the following questions; (1) What are the types of conceptual metaphors that are employed in Egyptian and American jokes? and how far do these conceptual metaphors in Egyptian and American jokes reflect cultural differences? (2) What types of script violations are commonly exploited in Egyptian and American jokes to evoke laughter? and how far are the humor techniques used by both Americans and Egyptians in their jokes different or similar? (3) How do cultural factors affect the perception and understanding of jokes in both Egyptian and American societies? (4) How far do both Egyptian and American jokes reflect the same fears and challenges of enduring a pandemic? To conduct this study a corpus of 32 Egyptian and American jokes was collected and, analysed using semantic script theory, conceptual metaphors, cultural references, and wordplay techniques. Findings show that both humor in Egyptian and American jokes arises from the violation of expectations or norms, drawing on different source domains. American humor often uses societal norms and shared experiences, while Egyptian jokes primarily focus on cultural references and social and historical issues.

**Keywords:** American jokes, conceptual metaphor, coronavirus pandemic, comparative study, Egyptian jokes, Semantic-script theory, lockdown jokes, COVID-19 pandemic jokes

# Exploring Conceptual Metaphors in American and Egyptian Jokes During the Coronavirus Pandemic: A Comparative Study

## 1. Introduction

Humor is a socio-cultural phenomenon that is commonly used by all humans. This is what (Zabalbeascoa, 2008) asserts as he maintains that humor has two main characteristics: it is a social phenomenon and it is also culture-related. Moreover, it is a universal aspect that is shared by all human cultures of different languages and various societies. It is essential in human communication, in the sense that it conveys social dynamics, cultural values and beliefs. Furthermore, it is used to spot and comprehend cultural similarities and differences. Many people consider humor as an essential phenomenon that is used to overcome difficult times. They regard it as a relief tool to reduce anxiety and worry, especially when the future seems insecure. This was manifested during 2020, when many people all over the world started to make humorous jokes to reduce the stress and fear of the pandemic and to overcome the feeling of boredom during the lockdown. As a result, many funny jokes about the quarantine, pandemic, lockdown, and virus jokes were launched on social media. As a social phenomenon, the current study examines several Egyptian and American jokes in order to explain how they reflect both societies. As a culturally-related phenomenon, the study investigates how these jokes are culturally-related to the Egyptian and American culture.

According to Attardo (2020), the word “humor” emerges as a technical term that covers anything that is regarded as funny, amusing, or laughable. Attardo (1994) divides humor into two types; referential and verbal. The latter type ‘verbal humor’ is the main concern of the present study as it focuses on ‘jokes’ which is an example of verbal humor (1994, pp.26-29). According to the Semantic Script Theory, the two types are indistinguishable, because the two share the same mechanisms (1994, p. 220). However, in the present study, since jokes belong to the genre of humorous discourse, the term ‘verbal humor’ will be used to refer to the jokes in this study.

According to Kuipers (2008), the joke is “socially and culturally shaped, and often quite particular to a specific time and place” (p. 1). As for the structure of a joke, it is made up of two main parts: the set-up (sometimes referred to as build-up) and the punch-line (Dyner, 2009). The set-up part is usually a narrative and/or a dialogue, whereas the punch-line is the last part of the joke (ibid). Moreover, three basic types of jokes are mentioned by Schmitz (2002). They are universal, cultural and linguistic ones. Universal jokes, on the one hand, indicate humorous utterances which are defined by the utterance context, cultural jokes, on the other hand, rely on shared cultural knowledge in order to be understood and appreciated. The last type is linguistic jokes are based on the linguistic aspects of the utterance including morphology, phonology or syntax of certain languages. Taking Egyptian and American jokes as examples, it is to be noted that any differences between these two sets of jokes may be influenced by cultural or social, or linguistic factors. Therefore, the current study aims to examine some Egyptian and American jokes in an attempt to find out the differences between the two cultures during the traumatic year of the coronavirus pandemic which the whole world had been through.

Joking is defined by Freud (1905) as “the ability to find similarity between dissimilar things – that is, hidden similarities” (1905, p.1617). Another definition of a joke which seems to be more or less the same idea is that it is “a contrast of ideas’, ‘sense in nonsense’, ‘bewilderment and illumination’ (ibid). Definitions that bring to mind the idea of contrasting ideas, which can be related to metaphor which is also based on duality. Thus, metaphor can be a source of a joke. Both jokes and metaphors draw an analogy or a relation between contrasting ideas or words and this leads to the humor. Drawing the analogy between jokes and metaphors is important to this study since one of the objectives of the study is to investigate the conceptual metaphors found in the jokes under question. This in turn helps in explaining how metaphors contribute to humor by producing unexpected associations and highlighting conceptual contrasts.

Egyptians are known for their innate lightheartedness and witty sense of humor. They always resort to humor and jokes to overcome their social and economic problems. Even during coronavirus pandemic, they created many jokes which mock coronavirus and their status during the lockdown. These jokes reflect their

ability to reduce and overcome the consequences of coronavirus through laughter. Accordingly, the researcher collects sixteen Egyptian jokes that were spread during the crisis on the social media to show Egyptians' sense of humor and to highlight how these jokes reflect the Egyptian society and culture. Similarly, Americans also had this sense of humor due to many factors. One of these factors maybe the result of America's enormous cultural diversity as people, there, come from different cultures to live in America. Therefore, this blending of cultures exposes Americans to different ideas and human behaviors that other countries may not have. This could help to explain why Americans do have this sense of humor. Therefore, this study attempts to compare between Egyptian and American humor, through jokes about coronavirus in order to spot the similarities and differences between the two cultures during the pandemic.

## **2. Aim of the Study**

By examining the jokes under question, this study aims to examine the cultural differences between Egyptians and Americans during the coronavirus pandemic through the use of conceptual metaphors in their jokes. In addition, it focuses on the similarities and differences between the two societies through the shared experiences found in the jokes. Furthermore, it attempts to show the different factors employed in the collected data that help in creating the humor in these jokes.

## **3. Research Questions**

The present study aims to find answers to the following questions:

- 1- What are the conceptual metaphors employed in Egyptian and American jokes? and how far do these conceptual metaphors in Egyptian and American jokes reflect cultural differences?
- 2- What types of script violations are commonly exploited in Egyptian and American jokes to evoke laughter? and how far are the humor techniques used by both Americans and Egyptians in their jokes different or similar?
- 3- How do cultural factors affect the perception and understanding of jokes in both Egyptian and American societies?

- 4- How far do both Egyptian and American jokes reflect the same fears and challenges of enduring a pandemic?

#### **4. Methodology and Data Collection**

For carrying out a comprehensive analysis of jokes, a combined framework is adopted. The jokes are analyzed in terms of both the Semantic-Script theory (SSTH) and Conceptual Metaphor theory (CM). The study utilizes two research methodologies: descriptive and comparative methods. The data of the study consist of (16) Coronavirus American jokes and (16) Coronavirus Egyptian jokes. The Egyptian jokes are translated, and then analyzed. The jokes under investigation were spread on Facebook during the lockdown, and were collected from different sources. As for the Egyptian jokes, they are taken from an article published on Al-Ahram newspaper, on Saturday, 6<sup>th</sup> of June 2020, written by Sanaa El-Beisy, while the American jokes are taken from a newsletter retrieved from <https://www.fatherly.com/entertainment/best-coronavirus-jokes>.

By conducting a comparative analysis of American and Egyptian jokes using these theoretical frameworks, this research aims to shed light on the cultural differences and similarities in humor. It seeks to deepen our understanding of how conceptual metaphors, incompatibilities, and cultural factors contribute to the creation and reception of jokes in these two distinct cultural contexts. Ultimately, this study reflects cultural values, beliefs and social dynamics in the two cultures through the description of the jokes under examination.

#### **5. Review of Literature**

This section is divided into three parts. Major social-psychological theories of humor, such as the theories of superiority, relief and incongruity theories are covered. In addition, linguistics theories of humor such as the semantic-script theory of humor, the general theory of verbal humor and the audience-based theory of humor are also reviewed. The second part of this section covers a variety of humor-related research topics that are connected to the theme of the present study. The uses of humor in society and its social function. Moreover, the third

part is a review on the previous studies that dealt with humor and jokes in relation to Egyptian society as well as the American society.

Humor is widely examined by many scholars from a variety of perspectives in an attempt to gain a full understanding of its nature and effects. Psychological, linguistic, semiotic, sociocultural, and other are some of these perspectives. Psychologically, humor is examined in terms of the cognitive processes involved in recognizing and appreciating humor, or the emotional experience of humor, or the social functions of humor (Veatch, 1988, Martin, 2007). Based on linguistic and semiotic perspectives, researchers focus on the linguistic and communicative mechanisms of humor. They analyze the linguistic devices used in humor such as wordplay, puns, irony, and sarcasm and explain how these devices create humor (Abd Al- Hamed Badr, 2016, El-Masry, 2021). According to sociocultural perspective, researchers explore how humor is influenced by cultural norms, values, and social identities (Jiang, et al 2019, Stanley, 2021). Studying humor from these various angles helps researchers to uncover all its aspects and to reveal its benefits. Dealing with humor from a linguistic perspective is a complex task that differs greatly from cultural, sociological, and psychological studies.

Attardo (2003) points out that until 1985 “no coherent theory of humor had been proposed, that would have been capable of handling humor at all linguistic levels” (p.1287). However, the most prominent theories of linguistic humor are those proposed by Raskin’s (1985) Semantic-Script Theory of Humor (SSTH) and Attardo’s (1994) General Theory of Verbal Humor (GTVH), and Ontological Semantic Theory of Humor (OSTH).

## **5.1. Social-Psychological Theories of Humor**

Three important theories examined humor from a social-psychological perspectives. These three theories are; Superiority Theory, Release/Relief Theory, and Incongruity Theory.

**5.1.1. Superiority Theory**, on the one hand, was proposed by Sigmund Freud (1905) who referred to humor as a feeling of superiority over others. Funny



things appear when the weaknesses, follies, or absurdities of others are highlighted, allowing others to feel superior. Raskin (1984), points out that people usually laugh because of others' bad luck. Bad luck emphasizes one's superiority to the shortcomings of others.

**5.1.2. Release or Relief Theory**, on the other hand, was also developed by Freud (1905). The theory suggests that humor is used to reduce or release psychological tension. According to Freud "the idea that joking has a vital psychological function to perform (cited in: Abdalian, 2005, p.7).

**5.1.3. The Incongruity Theory**, as mentioned by Attardo(1994, p.47), Kant and Schoenhauer, nineteenth-century German philosophers, are the first authors to explore the notion of the term incongruity in the modern age. Along history, many attempts have been made to explain the cause of laughter. One explanation was suggested by Schopenhauer, who states that "the cause of laughter in every case is simply the sudden perception of the incongruity between a concept and the real objects which have been thought through it in some relation, and laughter itself is just the expression of this incongruity" (cited in Attardo, 1994, p. 48). According to this view, one can deduce that humor arises from the conflict between abstract concepts and the perception of incongruity. The incongruity theory, thus, suggests that humor arises from the perception of incongruity or a violation of expectations. Humor and jokes are created as a result of a sense of surprise through presenting contradictory or unexpected elements.

In modern research, it is worth noting that the incongruity theory is most accurate in explaining humor. That is why it is considered a dominant theory of humor in philosophy and psychology. However, it is to be noted that there is no unified definition of 'incongruity' as it is not clearly defined by many linguists. A widely common definition that is mentioned by Ritchie Graeme (1999) is:

Laughter arises from the view of two or more inconsistent, unsuitable or incongruous parts or circumstances, considered as united in one complex object or assemblage, or as acquiring a sort of mutual relation from peculiar

manner in which the mind takes notice of them (Beattie , 1776), quoted in Raskin(1985).

According to this definition, humor is created when there is a conflict between what is expected and what actually happens. More specifically, it concentrates on the contrast between the hearer's expectations and the speaker's sudden resolution of the situation. This is what William (1940, p.72) states as he emphasizes the importance of the term incongruity saying that the main cause of humor in any situation is "contradiction" or "incongruity". By the end of any humorous situation, the hearer tries to realize the incongruity of the situation, in order to make the punch line obvious. Accordingly, humor is conveyed and laughter is stimulated.

Among these three theories, Zalta, Edward & Nodelman, Uri (2023), point out that the incongruity theory "seems better able to account for laughter and humor than the scientifically obsolete Relief Theory". Moreover, it seems "more comprehensive than the Superiority Theory since it can account for kinds of humor that do not seem based on superiority, such as puns and other wordplay".

## **5.2. Linguistic Theories of Humor**

Having reviewed the major social-psychological theories of humor, it is essential also to present the linguistic theories of humor, namely, the Semantic-Script theory, the General Theory of Verbal Humor and the Ontological Semantic Theory of Humor.

### **5.2.1.Semantic-Script Theory (SSTH)**

The SSTH was proposed by Victor Raskin in 1985. Raskin's theory changes the prevalent views on studying humor. According to him, humor arises when a situation violates the normal sequence of events or scripts. He means that humor is derived from the violation of expected patterns or scripts, thus, leading to a humorous reinterpretation of the situation. Raskin (1985) refers to the script as "a large chunk of semantic information surrounding the word or evoked by it" (p.81).

Later, Attardo (2001) states that the script refers to some associated information that indicates “how a given entity is structured, what are its parts and components or how an activity is done” (p.2). According to Raskin (1985), a text can be described as a joke if it is “compatible, fully or in part, with two different scripts” (p.99). More details about this theory are mentioned below under the theoretical framework section since it is the adopted theory in this study.

### **5.2.2.General Theory of Verbal Humor (GTVH)**

The General Verbal Theory of Humor (GVTH) was suggested by Attardo & Raskin, (1991) as a revision of the Semantic-Script Theory (SSTH). Whereas the SSTH was a semantic theory of humor, the GTVH is a linguistic theory that aims to analyze the joke through a comprehensive linguistic model, showing all aspects of the joke concept. Attardo & Raskin (1991) mention six parameters that are necessary to propose the construction of a joke into the text. These parameters are also regarded as Knowledge Resources (KRs) i.e. language, narrative strategies (NS), targets (TA), situations (SI), and logical mechanisms (LM). The nature of these KRs is as a supporting concept of opposition script (Attardo, 1994, pp.196-9). This it can be said that, in order to consider any text as a joke or a humorous text, it has to contain six knowledge resources. The first KR is language (LA) which includes all the needed information for the verbalization of a text such as phonemes, clusters of phonemes as well as morphemes and phrases (Attardo, 1994, p.223). The second is narrative strategy (NS) which accounts for the way any joke is organized either a simple narrative, as a dialogue (question and answer, as a (pseudo-) riddle, as an aside in conversation, etc. (Attardo, 1994, p. 224). The third KR is target (TA) which selects who is the “butt” of the joke. The targets of humor refer to groups or individuals with humorous stereotypes attached to each other (Attardo, 1994, p.224). Situation (SI) is the fourth KR which refers to the background of events, such as participants, objects, activities, or instruments, etc. Attardo (1994, p.225). The fifth KR is the logical mechanism (LM) which the part of the GTVH that accounts for the resolution of the incongruity (i.e. the script opposition and overlap). The final KR is script opposition which is the only parameter that has been incorporated into the GTVH from Raskin's (1985) Semantic Script Theory (SSTH). It deals with the opposed scripts that are understood by readers in a direct and indirect way (Attardo, 1994, p.226).

Whereas the description and analysis of the previous two theories (SSTH theory and GTVH theory) rely on the native speaker's knowledge and interpretation of a joke, a new theory of humor, that is; the Ontological Semantic Theory of Humor (OSTH) has started to emerge trying to remove human bias from the interpretations of jokes. However, it is to be noted that this new theory hasn't yet gained significant recognition in academic research.

### **5.3. Ontological Semantic Theory of Humor (OSTH)**

Ontological Semantic Theory of Humor (OSTH) is the latest version in the family of script-based linguistic theories of humor, that was developed by Raskin, Taylor and Hempelmann (2009). It embodies the Semantic Script Theory of Humor principles in a fully computational development to remove human bias from any semantic interpretation (Attardo, 2020, p.145). It aims to understand the meaning of words and sentences by examining the concepts and entities they refer to in the real world. It suggests that humor arises from incongruities or unexpected links between different ontological categories or concepts. It emphasizes the role of ontology in understanding language through studying the philosophy of the nature of existence (Taylor, 2017).

Having reviewed the most influential theories of humor, it is to be noted that all the theories are based on the notion of incongruity. This is what Hempelmann and Attardo (2011, p.130) have asserted as they state that the SSTH is classified as an incongruity theory and the GTVH as an incongruity- resolution- theory. Due to the importance of incongruity, the study chooses the incongruity theory in the Semantic script theory of humor to be adopted here. Therefore, it is worth mentioning the previous studies that dealt with the incongruity theory in analyzing humor and jokes.

### **5.4. Previous Studies Related to Pandemic Humor**

It is noteworthy to say that the COVID-19 pandemic is the first of such a pandemic in the past century and has prompted many scholars to study it from different aspects. The COVID-19 pandemic has led to entertaining humor, sweeping social media all over the world. Wang, and Wang, (2022) noted that "since the breakout of the COVID-19 pandemic in the early part of 2020, there

have been a series of investigations on pandemic humor”. However, it is noted that few studies have tackled the pandemic with a special focus on humor during the pandemic (Amici, 2020; Chiodo et al., 2020). According to Amici's research, humor may be utilized to separate oneself from negativity and transmit positivity. Humour was used to enhance social cohesion. In their research, Chiodo et al. (2020) stated that the COVID-19 pandemic provides a good opportunity for using humour as a coping mechanism that may also boost “camaraderie and morale”. Moreover, he pointed out that the pandemic encourages the use of gallows humour, which "includes jokes, irony and humorous remarks about frightening topics such as combat or death" (2020, pp.763–764). The following studies provide a range of different perspectives. Some studies consider the cognitive processes, others focus on linguistic aspects, or cultural influences, or psychological impact, or provide a systematic review on humor-related studies.

It is noted that there are many previous studies that have adopted incongruity theory in relation to jokes. In 1981, Vaid & Hull applied incongruity theory to analyze joke completions and they examined how individuals resolve incongruity in the context of joke understanding. They criticized previous studies that overlooked the role of incongruity in joke processing and emphasized the importance of considering incongruity in joke completion tasks. Attardo (1994) proposed a comprehensive work in which he explored various linguistic theories of humor, including incongruity theory. He examined how incongruity is used to create humorous effects in language, with a focus on jokes and wordplay. In 2003, Oring discussed the social and cultural aspects of humor, including incongruity theory. In his book, he explored how incongruity is used in jokes and humor across different cultural contexts. Moreover, he examined the role of shared knowledge and background in resolving incongruity. Nijholt (2003) wrote an article in which he provided an overview of various humor theories, including incongruity theory. He discussed how incongruity theory has been applied in different domains of humor research, including jokes, puns, and verbal humor. Moreover, he highlighted the cognitive processes involved in resolving incongruity. Another perspective on humor was presented by Martin (2007) as he provided an overview of different psychological theories of humor, including incongruity theory. He discussed the cognitive processes involved in resolving

incongruity and how humor emerges from the violation of expectations. In the same year, Ruch & Hehl (2007) examined the relationship between humor appreciation, aesthetic appreciation, and personality traits using incongruity theory as framework. They explored how individuals' cognitive processes in resolving incongruity influence their enjoyment of humor and their preferences for different types of jokes. Suls (2016) provided a comprehensive handbook in which he covered various theories and approaches to humor research, including incongruity theory. Suls (2016) explored the cognitive processes involved in resolving incongruity and the role of incongruity in different forms of humor, including jokes.

During the pandemic, a number of studies focused on Coronavirus pandemic in relation to humor. For example, Amici (2020) explored the use of humor during the period of isolation caused by lockdown measures imposed in Italy as a result of the Coronavirus pandemic. The study is based on a non-clinical sample. The ad hoc questionnaire measures people's readiness to search for, publish and distribute humorous material during lockdown. It investigates the intentions behind sending content via social media (WhatsApp or similar) and the emotions experienced on receiving such content. Findings show that positive emotions were more frequently the motivation (total 61.32%). A high percentage sent amusing content via social media or SMS (79%). Responses demonstrating a desire to lessen the situation's negative impact or a desire for cohesion were common. Amici concluded that humorous material appears to have served as a means of transmitting positive emotions, distancing oneself from negative events and finding cohesion. In the same year, Kamel wrote a research paper in which she approached verbal techniques of humor creation in comic TV shows. She adopted Raskin's (1985) SSTH in an attempt to analyze linguistically how comedians joke verbally in front of an audience in comic TV shows. She put cultural barriers into consideration throughout the analysis via the role of cultural literacy between the comedians and the audience

On a different perspective, Bischetti et al. (2021), studied the appreciation (funniness and aversiveness) of different formats of COVID-19 humor shared on social media. Results of an analysis of the role of demographic, personality, and psychological distance factors with linear mixed models showed that COVID-19

humor lacks a “signature” of funniness, but displays a mark of aversiveness. The findings of this study expanded the knowledge about dark humor and should raise awareness of the great variation in the emotional impact of COVID-19 humor and of the need to ponder where and with whom to share the laugh about the pandemic. In the same year, Gonot-Schoupinsky & Garip (2021) wrote a chapter in a book in which they highlighted the need for laughter, currently viewed as a by-product of humour within positive psychology (PP), to play a more prominent role. Widening the portrayal of humour and laughter in PP will be helpful to value and harness their individual, and joint, benefits and applications. They called for Third Wave PP to encourage new research directions by embracing the complexity of humour as 1) an interlinked character strength; 2) associated to all core virtues; 3) benefitting overall personal development; and 4) differentiated from but co-equal to laughter.

Torres-Marin et al. (2022) investigated the associations between humor styles, perceived threat from COVID-19, funniness of COVID-19 memes, and individuals’ affective mood in a community sample of 527 Spanish adults. Findings suggested that humor styles aimed at boosting one’s own self, irrespective of their potentially lighter or darker nature, may contribute to alleviating adverse psychological consequences arising from the COVID-19 pandemic. Another study that examined Coronavirus English jokes from a pragmatic perspective is written by Al-Saidi, Salman and Rashid (2022) in which they examined implicature in COVID-19 Coronavirus jokes in the light of a neo-Gricean approach adopted by Horn (1989/2004), Attardo (1997) as well as Thomas (1995).

Bageshwar & Zafar (2023) reviewed studies on social media-based COVID-19 humour in 42 research articles that were selected from four databases, viz. Science Direct, Scopus, Taylor & Francis, and Web of Science. The results concerning the characteristics and functions of COVID-19 humour reveal that most studies investigated image-text memes; the most important feature found was ‘humour,’ in addition to others like sarcasm, irony, satire, criticism, juxtaposition, and locality. In addition, it shows that although research on COVID-19 humour on social media is still in an early phase, several findings

appear stable across various studies included in this review. Moreover, most humour studied is not only about the virus or the disease itself, but also focuses on absurd situations individuals found themselves in due to the pandemic and the lockdown that followed.

Alkaraki, Alias & Maros (2024) presented a systematic literature review that they designed to conduct a thorough analysis of existing research on COVID-19 humor on social media, specifically its themes and categories, coping mechanisms, effects on confidence in government institutions, and the use of specific linguistic devices. It examined the role of humor in the COVID-19 pandemic, providing a detailed descriptive qualitative analysis of 49 worldwide studies between 2019 and 2022. The findings revealed that humor serves as a coping mechanism, assisting individuals in navigating the challenges and uncertainties of the pandemic, thereby promoting mental well-being. Humor emerged as a powerful tool to critique government actions, uncover inefficiencies, and shape public discourse. Moreover, linguistic devices, including wordplay, irony, satire, and parody, play a crucial role in conveying messages and emotions related to the pandemic.

Based on this review about the previous studies related to humor and the pandemic, it is to be noted that those studies are clearly different from the present study in terms of the data of analysis and the theories used. Moreover, to the knowledge of the researcher no study was made comparing between two different cultures in terms of jokes about COVID-19. In addition, whereas the previous studies use different perspectives as mentioned above, the present study uses an eclectic approach to study jokes about COVID-19 in two different cultures; Egyptian and American using the SSTH and Conceptual Metaphor theory. It's crucial to note that humor can vary widely among cultures, and people's tastes can vary greatly for what they find funny. Since humor is a complex and diverse aspect of any society, it is significant to give a background of what humor represents in both the Egyptian and American society.



### **5.5. Humor and Joke in Egyptian Society**

When it comes to humor, Egyptians are known for their wit and cleverness in making jokes. In Egyptian culture, humor and jokes are frequently used as a means of social commentary and criticism. Egyptians resort to humor to discuss social issues, political events, and cultural standards in a funny way. They love to make jokes about themselves in an attempt to make light of themselves. Humor plays an important role in Egyptian's life as it serves as a coping mechanism for them, especially in challenging or stressful situations. It helps them adapt through life's ups and downs. Moreover, humor and jokes shape and reinforce Egyptian cultural identity. They reflect the values, beliefs, and traditions of the society, and act as a way to transmit cultural knowledge from one generation to the next. The rise of the internet and social media platforms has had a significant impact on the spread of humor in Egyptian culture especially jokes, memes, viral videos, and online communities .

### **5.6. Humor and Jokes in American Society**

Americans are known for their sense of humor. This may be due to the fact that they come from different countries, each contributing their own aspect of what is funny. Because American culture is incredibly diverse, it is noted that humor reflects this diversity. They use jokes for different purposes. Standup comedy is considered by many to be essentially American. There are also many TV shows that are considered humorous and satirical at the same time. Satire is a prevalent form of humor, with comedians and comedy shows using wit and irony to shed light on societal issues, political events, and cultural norms. The present study aims to analyze some jokes created by Americans for deeper understanding of the sociocultural American aspects especially in hard times such as the pandemics.

## **6. Significance of the Study**

This study might contribute to humor research for the following reasons. Linguistically speaking, the literature mentioned above focuses majorly on verbal

humor concerning semantics, cognition, and pragmatics. However, this current study proposes a focused semantic approach to verbal humor putting cultural factors into consideration by examining conceptual metaphors found in the jokes under investigation which makes this study unique. Thus, the study is based on two linguistic theories commonly used for understanding humor in two different cultures. These include the conceptual metaphor theory and the semantic-script theory. This combined framework provides a comprehensive analysis and understanding of jokes that belong to two different cultures, namely; Egyptian and American. Thus, the paper contributes to humor research paper via a profound analysis of jokes in different cultures. Moreover, the study highlights to what extent how the conceptual metaphors in the collected data are different or the same when it comes to Covid-19 and quarantine in the two societies. It investigates whether Egyptian and American jokes reflect the same anxieties and challenges of living through a pandemic or not.

## **7. Theoretical Framework**

Humor and jokes are essential aspects of human communication, reflecting cultural values, beliefs, and social dynamics. They serve as powerful tools for expressing and understanding cultural differences and similarities. The study aims to explore the differences between American and Egyptian jokes by employing two theoretical framework, namely; Semantic Script theory and Conceptual Metaphor Theory as analytical frameworks. The Semantic Script theory, on the one hand, offers a framework that considers the role of established scripts and schemas in shaping humor. By analyzing jokes through the lens of the Semantic Script theory, the study aims to identify a semantic model capable of expressing the incongruities between semantic scripts in the collected data of jokes and how humor is created in both cultures. On the other hand, Conceptual Metaphor theory posits that metaphors are not just linguistic devices but also cognitive tools that shape our understanding of the world. By analyzing American and Egyptian jokes through this lens, the study uncovers the underlying conceptual metaphors and cognitive mappings that structure these jokes' humorous elements. Hence, the theory delves into the cultural differences and examines how conceptual metaphors are utilized in humor across different cultures. Through this analysis, we can gain insights into the cultural nuances and metaphorical associations that

contribute to the humor in each culture's jokes. However, before displaying the theoretical frameworks adopted here, it is worth mentioning some basic concepts about jokes, its structure and types since it is the core of this study.

Jokes are defined in terms of incongruity as laughter being the result of the sudden perception of the incongruity between a concept and the real objects it is believed to be associated with. Jokes consist of three basic elements: build up, pivot, and punch line. The build up is the body of the joke, introducing it, while the pivot is the group of words or phrases around which incongruity is built. The punch line is the conclusion of the joke, disrupting the narrative for humorous purposes.

Linguists (such as Attardo (1994); Attardo (2003); Schmitz (2002)) classified jokes into different types, such as referential, verbal, canned, cultural, and linguistic. Referential jokes are based on the meaning of the given text, while verbal jokes are based on the meaning of different elements of the text. Canned jokes are short narratives ending in a punch line and cultural jokes are laughter closely connected to culture. Linguistic jokes are based on some linguistic features. Knowing these classifications helps the researcher to identify the types of jokes under investigation which can, in turn, help in understanding a particular joke as it not only requires knowledge of the language used to convey the joke, but also other types of knowledge such as cultural knowledge. The jokes under investigation come from two different cultures, American and Egyptian, and are related to COVID-19 as a universal crisis. In addition, the study deals with jokes in terms of incongruity.

### **7.1. The Script-based Semantic Theory of Humor**

Most of the research on humor in linguistics did not focus on the semantics of humor, although the essence of humor is semantic according to Attardo (2020, p.124). It is to be noted that the Semantic-Script Theory of Humor is widely recognized to have been one of the most successful theories of humor. Raskin (1984) hypothesizes that a text can be a joke if two essential conditions are present. These two conditions are: “the text is compatible, fully or in part, with two different [semantic] scripts, and the two scripts with which the text is compatible are opposite (Raskin, 1984, p.99). This hypothesis is based on the fact that humor is a result of the sudden encounter of two ideas that do not fit together.

However, he asserts that the existence of two scripts opposing each other does not guarantee humor because there are other variables that govern its production. Therefore, he presents various types of script opposition, such as good/bad, life/death, obscene/non-obscene, money/no money, high/low stature, normal/abnormal, possible/impossible, and actual/non-actual (Raskin, 1984, p.114). Incongruity reshapes people's perceptions of things through its critical and opposing dimensions of social activities, political ideas, and religious beliefs. Raskin proposes various examples of jokes and introduces different categories of script opposition, such as judgmental dichotomy, death vs. life, obscene/non-obscene, and money/no money. A complete list of possible script oppositions for jokes is finite and culturally dependent.

Raskin (1984, p.100) points out that joke telling is a form of non-bona-fide communication that occurs in four different situations. In the first case, the speaker makes the joke unintentionally, engaging in bona-fide communication, aiming for an unambiguous statement. In the second case, the hearer initially interprets the speaker's statement as bona-fide communication, but after unsuccessful attempts, they search for alternative interpretations, leading to the joke-telling mode. In the third case, the hearer is "attuned" to the joke and does not attempt to interpret the text within this mode. In the fourth case, there is a possibility that an act of bona-fide communication occurs if some non-humorous interpretation of the speaker's utterance is possible. In this case, the unintended and unnoticed ambiguity is suppressed.

Mentioning that a joke is humorous if it is compatible with two scripts which are opposite, it implies that the switch from one script to the other is triggered by either ambiguity or contradiction. The trigger introduces the second script and suggests a second interpretation of the text. That is what Raskin (1984) asserts as he states that "the usual effect of the trigger is exactly this: by introducing the second script it casts a shadow on the first script and the part of the text which introduced it, and imposes a different interpretation on it, which is different from the most obvious one" (p.114). Ambiguity, according to Dynel (2009), is the case in which there are two interpretations competing with each other, although she

admits that it is possible that there could be more than two interpretations. (Dyner 2009, p. 124). There are two types of ambiguity commonly used as the source of humors: lexical and syntactic ambiguity. Lexical ambiguity, on the one hand, involves manipulation of legitimate and meaningful morpheme/lexeme, eliciting a serious and humorous interpretation. This ambiguity uses homonymy and polysemy, which can involve word class change (Seewoester, 2009). On the other hand, syntactic ambiguity occurs in a sentence level due to the structure of the sentence. Syntactic jokes depend on a duality of interpretation motivated by the structural patterns of the language system, not of any lexical item but of the sentence of the syntactic level (Lew, 1996 , p. 128). The other major type of trigger is the contradiction trigger, which is more complex in nature. It operates differently from ambiguity, with some lexical triggers being ambiguous words and phrases. A slight variety of the contradiction trigger is the dichotomizing trigger, which is created by a pair of antonyms built into the joke. In a joke, the roles are usually reversed, creating a type of contradiction, triggered by a combination of the trigger and the conventions of the mode of communication (Raskin, 1985, pp.116-117).

It is also worth mentioning that Raskin (1985) analyzes the Script-based Semantic Theory of Humour (SSTH) as a linguistic analysis of incongruity. He believes that for jokes to generate humour, a connection between two scripts must be established. This leads to the incongruity theory, which suggests that humour is produced by an identified incongruity and its resolution. However, Raskin (1985) emphasizes that the incongruities must overlap or be associated, and without this connection, humour cannot be produced. He concludes that incongruity is best understood linguistically with the SSTH, which can be applied to other humorous texts such as jokes.

### **7.1.1. The Interpretation of a Joke**

Ritchie (2004, p.59) suggests that any humorous situation or passage can be examined and analyzed in terms of having two main parts that are somehow incompatible. It can be said that a joke is a text that consists of many overlapping

scripts of which every script is the set-up or the punch line of another one. The introductory part is usually referred to as the set-up, and the second one is called the punch line, which may take the form of one word or a group of words. Moreover, Ritchie (2004) states that the setup of a joke can be interpreted in two different ways, however, the reader typically interprets one meaning only which is the more obvious meaning and remains unaware of the alternative interpretation. The punch line, however, contradicts this apparent interpretation and aligns with, and even brings forth, the previously hidden meaning. The punch line operates on a cognitive level, allowing the mind to establish connections with the body of the joke based on the information given, thereby eliciting the intended meaning.

Raskin (1985) points out that comprehending a joke relies on the ability to interpret its semantic meaning, which is influenced by two sources: the lexicon (vocabulary) and our knowledge about the world we live in. The minds store a collection of cognitive structures, similar to how the meanings of words in the languages are internalized when we speak. Generally speaking, these cognitive structures can be referred to as "common sense" and encompass our comprehension of different routines, standard procedures, basic situations, and more. In other words, they represent our knowledge of how people typically behave in certain situations, the processes they follow, the order in which things occur, and more. Here, according to the SSTH, these cognitive structures are commonly referred to as scripts. After displaying the SSTH, it is significant also to demonstrate the Conceptual Metaphor theory (CM) due to its importance to the analysis of this study.

## **7.2. Conceptual Metaphor Theory**

Conceptual metaphor is a cognitive linguistic approach that involves understanding one conceptual domain in terms of another as asserted by Kovecses (2010, p.3). It involves thinking about various concepts, such as life, love, arguments, theories, ideas, and social organizations in terms of other concepts such as journey, war, buildings, food and plants, respectively. He states that two domains participate in conceptual metaphor: the source domain and the target domain. The source domain is the conceptual domain from which metaphorical expressions are drawn, while the target domain is understood this way. Examples

of linguistic expressions used to talk about target domains, as presented in Lakoff and Johnson's (2003) book, include "an argument is war," "an argument is indefensible," "He attacked every weak point in my argument," and "He shot down all of my arguments". Kovecses (2010) distinguishes between conceptual metaphor and metaphorical linguistic expressions, stating that linguistic expressions are manifestations of conceptual metaphors.

Conceptual metaphors typically use a more abstract concept as target and a more concrete or physical concept as their source. To fully understand an abstract concept, it is better to use another concept that is more concrete, physical, or tangible than the abstract target concept. This principle of unidirectionality suggests that the metaphorical process typically goes from the more concrete to the more abstract but not the other way around (Kovecses, 2010, p.7). Moreover, conceptual metaphor is considered as a set of mappings that characterize the relationship between two concepts (A and B) in a metaphorical process. The question is how A is understood in terms of B, with constituent conceptual elements of B corresponding to constituent elements of A. For example:

<b>Source: JOURNEY</b>	<b>Target: LOVE</b>
the obstacles encountered	the difficulties experienced
decisions about which way to go	choices about what to do
the destination of the journey	the goal(s) of the relationship

According to the Conceptual Metaphor theory, the metaphorical process involves a set of correspondences between the source and target, such as the journey, events, obstacles, difficulties, decisions, and destination of the journey (Kovecses, 2010).

Kovecses (2010) presents some of the most common source and target domains. He states that the source domains, on the one hand, include the human body, health and illness, animals, machines and tools, buildings and construction, plants, games and sport, cooking and food, economic transactions, forces, light and darkness, heat and cold, and movement and direction. On the other hand, the common targets

include emotion, desire, morality, thought, society, religion, politics, economy, human relationships, communication, events and actions, time, and life and death. According to these examples, it can be deduced that the target domains fall into such higher groups as psychological and mental states and events, social groups and processes, and personal experiences.

Conceptual metaphors can be classified according to the cognitive functions that they perform into three general kinds, namely; structural, ontological, and orientational. As for the structural metaphor, its cognitive function is to understand target concepts by means of the structure of source domain. For instance, the concept of time is structured according to motion and space, with the TIME IS MOTION metaphor focusing on basic elements such as physical objects, their locations, and motion. The metaphors are structured into two distinct cases: "TIME PASSING IS MOTION OF AN OBJECT AND TIME PASSING IS AN OBSERVER'S MOTION OVER A LANDSCAPE." In the first case, the observer is static, and times are objects moving with respect to the observer. In the second case, times are fixed locations and the observer is moving with respect to time. Kovecses (2010, p.38) asserts that these mappings not only explain the meaning of certain expressions but also provide a basic overall structure for the notion of time. Without the metaphor, it would be difficult to imagine what the concept of time would be. Most structural metaphors provide this kind of structuring and understanding for their target concepts.

The second type is ontological metaphor which provides much less cognitive structuring for target concepts than structural ones do. Its cognitive function is to give a new ontological status to general categories of abstract target concepts and to bring about new abstract entities. It assigns a basic status in terms of objects, substances, and the like to many of our experiences, particularly those that are not clearly delineated, vague, or abstract. Target domains include physical objects, non-physical or abstract entities, substance, and states. Undelineated experiences receive a more delineated status via ontological metaphors, which can be used to refer to, quantify, or identify aspects of the experience. Personification is another form of ontological metaphor, where human qualities are given to non-human



entities. This is common in literature and everyday discourse, as seen in examples like "his theory explained to me the behavior of chickens raised in factories," "life has cheated me," "cancer finally caught up with him," and "the computer went dead on me." In personifying non-humans as humans, they are understood better. Concepts are conceptualized in a uniform manner, with upward orientations tending to be inclined to positive evaluation and downward orientations tending to go with a negative one. Positive-negative evaluation is not limited to spatial orientation up-down, but also extends to various spatial image schemas, with positive concepts being whole, center, link, balance, in, goal, and front, and negative concepts being not whole, periphery, no link, imbalance, out, no goal, and back.

The different types of metaphor are significant to the present study in the sense that finding out which of these kinds of metaphors is frequently used in the collected data of both American and Egyptian jokes, the study uncover the underlying conceptual metaphors and cognitive mappings that structure these jokes' humorous elements. Thus, an insight into the cultural differences and metaphorical associations that contribute to the humor in each culture's jokes. In addition, by conducting a comparative analysis of American and Egyptian jokes using these two theoretical frameworks, the aim is to shed light on the cultural differences and similarities in humor in both the American and Egyptian cultures. It seeks to deepen our understanding of how conceptual metaphors and incongruities contribute to the creation of jokes in these two distinct cultural contexts.

## **8. Data Analysis**

A comparative study of American and Egyptian jokes about Covid-19 and quarantine would be an interesting topic to explore. However, it is important to note that humor is culturally specific and varies greatly across different languages and societies. Therefore, any differences between the two cultures in terms of jokes about Covid-19 may be influenced by cultural, social, and linguistic factors. The first part of this section is an analysis of sixteen American jokes. An explanation of the joke in terms of the semantic script theory is given, followed by an

exploration of the type of conceptual metaphor used in the joke showing its significance. Then, the second part is devoted to the analysis of sixteen Egyptian jokes. First a translation of the joke into English is provided, followed by a description the joke in terms of the semantic script theory, followed by an investigation of the type of conceptual metaphor use in each joke.

### **8.1. The Analysis of the American Jokes**

This section presents an analysis of 16 American jokes according to the Semantic Script Theory and Conceptual Metaphor Theory.

**Joke 1: "Quarantine has turned us all into dogs. We roam the house all day looking for food. We're told 'no' if we get too close to strangers. And we get really excited about car rides."**

According to the Semantic Script Theory, humor results from the violation of established social norms or expectations. In this joke the semantic script is used in a way to compare human behavior during quarantine with usual behaviors associated with dogs. It draws attention, in a humorous way, to similarities between the actions of dogs (such as roaming for food, being cautious around strangers, and getting excited about car rides) and humans' actions by establishing the semantic script of dogs as a point of reference. The humor arises from the unexpected connection between human and dog behavior within the established script of quarantine. In other words, the joke plays on an exaggerated image of human behavior during quarantine, thus presenting humans as having acquired dog-like behaviors due to the circumstances of quarantine. Moreover, the joke relies on shared experiences and knowledge of dog behavior and quarantine restrictions. By referring to familiar behaviors associated with dogs and the common experience of quarantine, the joke relies on the reader's understanding and recognition of such situations, and hence, reinforcing the humor. Furthermore, it is to be noted that the joke contains a conceptual metaphor in which humans are compared to dogs in order to convey the shared experiences

and behaviors during quarantine. The metaphorical mapping allows the reader to conceive the monotonous life of quarantine (such as roaming the house, seeking food, maintaining distance from strangers, and getting excited about car rides) through the lens of a dog's actions, adding a sense of humor to the joke. The type of conceptual metaphor, here, is **ontological** that provides ways of highlighting the experience of being in quarantine by comparing it to being a dog through its common attributes and behaviors.

**Joke 2: "Who's idea was it to sing 'Happy Birthday' while washing your hands? Now every time I go to the bathroom, my kids expect me to walk out with a cake."**

Similarly, joke no. 2 plays also with the semantic script, however, this time by associating washing hands and to singing "Happy Birthday" as a measure of time. According to the Semantic Script Theory, the humor is created through exaggerating the expectation of the kids that their father will walk out with a cake every time they go to the bathroom to wash their hands. The humor, here, arises from the violation of the unexpected and humorous association between washing hands and the the cultural practice of celebrating birthdays. In America, during the COVID-19 pandemic, "Happy Birthday" song gained prominence as a way to guarantee proper hand hygiene. The humor derives from the unexpected consequence that the speaker's kids associate going to the bathroom with the expectation of a birthday celebration, symbolized by walking out with a cake. The violation of the expected script for going to the bathroom and the humorously exaggerated reaction of the kids creates the humor in this joke. There is an example of an **ontological** metaphor in this joke through the exaggeration in associating singing "Happy Birthday" while washing hands and the expectation of a celebration. It utilizes the idea of a birthday traditional practice (celebrating with a cake) to humorously express the concept of an unexpected consequence resulting from the act of singing "Happy Birthday" while washing hands.

**Joke 3: "My husband purchased a world map and then gave me a dart and said, 'Throw this and wherever it lands—that's where I'm taking you when this pandemic ends.' Turns out, we're spending two weeks behind the**

**fridge."**

Many people have been unable to plan for their vacation during the COVID-19 pandemic because of safety measures and quarantine measures. The humor in joke no.3 stems from the semantic script of arranging a future trip after the pandemic and the unexpected outcome of the dart landing in an odd place behind the refrigerator. The humor comes from the common experience of delaying travel plans and the absurdness of spending a holiday behind the fridge. Throwing a dart is an example of a **structural** metaphor that represents the selection of a travel destination.

**Joke 4: "My mom always told me I wouldn't accomplish anything by lying in bed all day. But look at me now, ma! I'm saving the world!"**

This joke plays with the semantic script of being a couch potato and unproductive by wasting time and lying all day in bed doing nothing and the idea of accomplishing significant achievements. The humor arises from the twist of being in bed all day— a notion that was previously viewed by the majority of mothers as a lack of accomplishment and the fact that lying in bed during the pandemic is now equal to saving the world and making progress. It is to be noted that the joke highlights the cultural value of productivity and the idea of achievement through working and being active. The joke plays on the contrast between the mother's expectation and the unexpected outcome of the speaker's actions. An **orientational** metaphor in this joke uses the concept of lying in bed all day to express the idea of accomplishing something significant (saving the world) by being in that position.

**Joke 5: "After years of wanting to thoroughly clean my house but lacking the time, this week I discovered that wasn't the reason."**

This joke plays with the semantic script of wanting to clean the house, but the lack of time is the obstacle of cleaning it. However, the humor arises from the unexpected confession that lack of time was not the actual reason for not cleaning the house. It is obvious that the joke does not rely on conceptual metaphor. It only

plays on words and does not rely on metaphorical comparisons. It is noted that the joke reflects the cultural expectation of maintaining a clean and organized home. The humor reflects the shared experience of doing nothing especially because of laziness. In addition, the humorous twist derives from the fact that shortage of time could be one of the reasons but not the main reason for not completing household chores. Stating that time was not the main reason destroys the expected script and adds humor to the situation. This unexpected twist creates the humor in the joke as the speaker realizes the true reason for not cleaning was not a shortage of time, yet laziness or a lack of desire.

**Joke 6: "If I keep stress-eating at this level, the buttons on my shirt will start socially distancing from each other."**

This joke plays with the semantic script of stress-eating which refers to consuming food as a coping mechanism during stressful times and the concept of social distancing. It introduces a humorous comparison between the buttons on the person's shirt and the idea of social distancing due to the excessive eating. This unexpected twist between the concept of social distancing and the physical separation of buttons on a shirt creates a humorous effect. The joke reflects the cultural context of the Coronavirus pandemic and the widespread familiarity with the concept of social distancing. The humor derives from the shared experience of stress-eating reflected in the metaphor of the buttons on the speaker's shirt "socially distancing" from each other and the playful application of the social distancing which is one of the measures recommended during the pandemic. The conceptual metaphor in this joke is, thus, an **ontological** metaphor. It humorously uses the concept of social distancing to convey the idea that the buttons on the shirt will be far apart due to excessive stress-eating. This unexpected comparison between the two unrelated concepts generates humor.

**Joke 7: "Being quarantined with a talkative child is like having an insane parrot glued to your shoulder".**

Joke no. 7 uses the semantic script of being quarantined with a chatty toddler and the feeling of carrying a crazy parrot on one's shoulder. A humorous comparison between the two situations is presented, highlighting the ceaseless and repetitive speech. Based on the shared cultural knowledge of the troubles associated with having a talkative child during quarantine which was the prevailed situation in many homes at that time. It humorously exaggerates the child's talkativeness and compares it to an insane parrot, subverting the social script of spending time with children during quarantine. The unexpected comparison and the humorous image it evokes creates the humorous effect in this joke. Based on this comparison one may deduce that there is a **structural** metaphor in which a similarity is drawn between being quarantined with a talkative child and having an insane parrot stuck to your shoulder.

**Joke 8: "Since we're all in quarantine I guess we'll be making only inside jokes from now on."**

This joke uses the semantic script of being in quarantine and the concept of inside jokes. A humorous twist arises from the comparison that since the general public are in quarantine, the jokes made during that time will also be 'inside' jokes. It can be said that the joke relies on the shared experience of being in quarantine, which has become the prevailed phenomenon because of the COVID-19 pandemic. One explanation is that the humor arises from the indication that everyone is now part of the same inside joke due to the shared experience of quarantine. Another explanation is that since all are in quarantine, jokes made by people are all about events or things happening inside the home not outside. The joke uses an **orientational** metaphor which suggests that "inside jokes" refers to jokes that are comprehended by a particular group of people who share the same experience or knowledge. The joke humorously extends this concept to imply that, in quarantine, all jokes will be "inside jokes" because everyone is sharing the same experience. By stating that "we'll be making only inside jokes from now on" due to quarantine, the joke subverts the expectation that inside jokes are limited to specific contexts or groups. Hence, the humor comes from playing on words and

the twist of meaning, as the phrase "inside jokes" has two meanings, literally it refers to jokes made inside the house and figuratively it refers to jokes understood by a specific group. The joke uses the spatial concept of being inside to represent the idea that jokes made during quarantine will now be limited to the experiences of being at home.

**Joke 9: "This morning I saw a neighbor talking to her cat. It was obvious she thought her cat understood her. I came into my house, told my dog — we laughed a lot."**

The joke plays with the semantic script that highlights the behavior of talking to pets and the funny assumption that cat can understand. There is a contrast between what the neighbor thinks about his/her cat that understands his/her and the fact that cats are not recognized for being able to comprehend human language. Compared to dogs, they are typically viewed as independent and reserved pets. The unexpected comparison between the neighbor's behavior with his/her cat and the speaker's conversation with his dog whom he talks to and laughed together what makes the situation humorous. There is an **ontological** metaphor, here, as the joke uses the conceptual metaphor of giving animals human-like understanding. The speaker's reply, telling his dog and they both laughed, adds humor to the situation while reinforcing the idea that people and animals do not comprehend one another.

**Joke 10: "Nothing like relaxing on the couch after a long day of being tense on the couch."**

This joke plays with the semantic script of relaxation after a long exhausting day on couch and the the usual concept of relaxation associated with couches. The irony of the situation and the contrast between stress and relaxation creates the humor in the joke. It is found that the joke plays on the shared experience of spending extended periods of time at home during quarantine, where the couch becomes a symbol of both comfort and imprisonment, thus, creating humor. The

joke relies on the conceptual metaphor of physical tension and comfort. It is an **orientational** metaphor that humorously suggests that sitting on a couch can cause tension, despite its usual association with relaxation. It uses the spatial concept of being on the couch to represent the idea of experiencing tension or stress.

**Joke 11: "Day 121 at home and the dog is looking at me like, 'See? This is why I chew the furniture!'"**

The joke demolishes the social norms of staying at home for a long time during the pandemic. The contrast between the behavior of the dog (chewing furniture) and the feeling of boredom that comes with being confined to home, creates the humor here. The humor comes from the irony that the dog, who is usually associated with destructive behavior, now seems to mock the speaker for being in a similar situation. This highlights the humorous frustration of the dog and the absurdity of the situation. It is obvious that the joke utilizes a **structural** metaphor that attributes human feelings and thoughts to animals by drawing a comparison between the speaker's behavior due to the extended stay at home and the destructive behavior of dogs.

**Joke 12: "I've gained so much weight during lockdown my bathroom scale is telling me that it can only weigh one person at a time."**

This joke plays with the semantic script of gaining weight during lockdown and the reaction of the bathroom scale. The joke depends on the literal meaning of the message shown on the scale which states only one person can be hold at a time due to the increased weight. This unexpected twist between the expected function of the scale and the scale's message that the speaker has put on so much weight during lockdown creates the humor. Normally, scales are used to measure weight accurately, however in this instance, the scale's exaggerated response which gives an impression that it is a person is peculiar and unexpected. The joke makes use of cultural experiences around weight gain and the difficulties of



maintaining one's health during lockdown. Moreover, it is based on the shared experience of the gaining weight during the lockdown period that many people suffered from due to changes in habits which, in turn, caused a reduction in their physical activity. The metaphorical expression of the bathroom scale's humorous response is an example of **structural** metaphor which suggests that the speaker has gained so much weight.

**Joke 13: "Lockdown means you get to decide each day what outfit you'll wear in your living room."**

The humorous twist in joke no.13 comes from the contrast between the traditional context of choosing costumes for going out and the unexpected context of choosing costumes for the living room. In this respect, the joke depends on the social script of wearing outfits while going outside the house for different purposes. However, during the quarantine period, people feel free to select what outfit they want to wear while going to their living room, this indicates that they no longer need to wear their clothes for outside social activities. It is to be noted that the joke depends on the shared experience of spending more time at home during lockdown. Moreover, it reflects the idea that selecting outfits for an at-home setting becomes something creativity in the very common routine of daily life. It can be noticed that there is a structural metaphor in which wearing an outfit means going out.

**Joke 14: "What does eating raw garlic have to do with preventing COVID-19? It helps keep everyone at a safe distance."**

As obviously seen from the contradiction between the expected value of eating raw garlic and the unexpected twist that it helps keep people at a safe distance because of its odour, the humor is created. The joke subverts the social script of precautions against COVID-19 by introducing a humorous alternative to social distancing. It plays with the established script of protecting oneself and others from the virus and introduces a comical twist by recommending that chewing

garlic helps maintain a safe distance. It plays on the shared understanding of precautions and humorously suggests an unconventional method. In other words, it draws on the cultural context of the COVID-19 pandemic and the widespread awareness of social distancing measures. The joke contains an **ontological** metaphor in which eating raw garlic creates a physical smell that keeps people at a safe distance, similar to the social distancing measures.

**Joke 15: "I would make a COVID-19 joke, but it would be tasteless."**

This joke relies on the contradiction between the expectation of making a joke and the unexpected twist that it would be tasteless which is one of the symptoms that one can have if he/she has a coronavirus. This twist creates humor, especially with the use of pun in the word "tasteless." The joke uses cultural experiences related to one of the symptoms of COVID-19 which is the loss of taste. In this joke, the underlying conceptual metaphor is that jokes have taste, while COVID-19 jokes are tasteless. Here, an **ontological** metaphor is found in which it treats abstract concepts (e.g., jokes,) as if they possess concrete properties (e.g., taste) and applies the reasoning associated with those properties. It plays on the double meaning of "tasteless," referring both to a joke as lacking in humor and to the idea that making a joke about a sensitive topic like COVID-19 would be inappropriate.

**Joke 16: "What's the worst part of homeschooling? You can't transfer students out of your class."**

This joke relies on the contradiction between the expected difficulties of homeschooling and the unexpected twist of the inability to transfer students out of the class. The humor arises from the unexpected connection between homeschooling and the lack of ability to transfer students. The joke, thus, subverts the social script of traditional schooling and introduces a humorous critique of homeschooling. It humorously suggests that homeschooling lacks the flexibility of transferring students between classes. This joke does not heavily rely on

conceptual metaphors. However, it relates to the cultural context of homeschooling, which became more prevalent during the COVID-19 pandemic.

After displaying the analysis of the American jokes, the following section deals with the analysis of the selected Egyptian jokes.

## 8.2. Egyptian Jokes Analysis

This section presents 20 Egyptian jokes that are translated and analyzed in terms of the Semantic Script Theory and the Conceptual Metaphor Theory.

1- الصحة بتقول اغسل ايديك لمدة عشرين ثانية قبل الاكل. أهلي جايبين كباب رحت أغسل ايدي ورجعت لقيتهم بيشرىوا الشاي.

**Translation:** Ministry of health announces: wash your hands for twenty seconds before eating. My family brought kabab, and when I went to wash my hands I came back and found them drinking tea.

The humor in this joke comes from the unexpected contradiction between the person's action of washing his hands for hygiene and his family's action of finishing the kabab without waiting for him. The expected behavior that his family will wait for him till he washes his hands and the actual behavior that they have finished the kabab and even drinks the tea which is a habit among Egyptians to drink tea after the meal what creates the humor in this joke. The humor arises when the person follows the health advice to wash his hands, but finds his family not following the same advice and not caring to wash their hands and instead, they were engaged in eating the kabab which he was longing to eat it as it is a delicious dish that is favored by many Egyptians. It is to be noted that the joke highlights a cultural awareness of the importance of hygiene and cleanliness in relation to COVID-19. It highlights the humorous aspect of a common situation where some people may take hygiene measures more seriously than others around them. Moreover, it is to be noted that the joke plays on the metaphorical concept of time as a physical entity that can be measured by washing hands for 20 seconds to guarantee perfect hygiene. Besides, drinking tea is another metaphor that suggests

finishing the meal. Both metaphors can be considered **ontological** metaphors in which an abstraction such as an activity, emotion, or idea, is represented as something concrete.

2- بعد ما فشل موضوع وعي الشعب احنا دلوقتي بنراهن علي جدعنة الفيروس.

**Translation:** After the failure of public awareness, we are now betting on the virus's manhood.

This joke plays with the semantic script of the public awareness and the unexpected solution suggested, which is based on the personification of the virus as if it were a human being that can stop this situation. The unexpected twist creates a humorous effect. The joke reflects a cultural perspective on the importance of public awareness and the frustration that can arise when it fails. It uses humor to comment on the perceived ineffectiveness of public awareness campaigns and the reliance on unconventional solutions. The humor arises from the incongruity of the situation, emphasizing the apparent absence of applicable measures in tackling the problem. The joke used personification as the speaker humorously attributes human characteristics (manhood) to the virus. Accordingly, it criticizes the lack of public awareness and suggests in a humorous way that the only solution for this problem is to count on the virus itself, and consider it as a strong powerful man who is aware of the dangerous of the virus and can stop this difficult situation. The type of metaphor in ‘the virus is a powerful man’ is **ontological** because it assigns human characteristics which is powerfulness to an entity; that is, the virus. The metaphor indicates that the virus possesses qualities of strength, influence, or dominance, much like a powerful man would.

3- النهاردة بس عرفت قيمة الكمامة.. عدت جنب واحد سالف منه فلوس ومعرفنيش.

**Translation:** It is just today that I realized the value of the mask. I passed by someone I owed money to, and he didn't recognize me.

The joke plays with the semantic script of the unexpected outcome of a person being unrecognized by a person he owes money to because of wearing a mask. The humor, here, depends on the contradiction between the person's intention to wear the mask to protect himself from the virus and the unintended consequence of protecting someone from debt repayment by wearing the mask. The humor, here, is created after knowing the extended value of wearing a mask. The joke plays on the double meaning of "value" – one is typically obvious; that is, the importance of wearing a mask for health reasons and the other conveys a message that is not so clear; that is, the monetary value of the mask itself. Accordingly, the joke reflects a cultural awareness of the hidden benefits of wearing masks, such as anonymity and concealment, which creates the humorous situations. It highlights the shared experience of owing money to someone, adding a relatable element to the humor. The joke contains an **ontological** metaphor in which it assigns a physical attribute (wearing a mask) to an abstract concept (disguise). It suggests that the act of wearing a mask is representative of disguise, emphasizing the notion of hiding one's true identity.

4- وكان المصريون القدماء في عام ٢٠٢٠ يحتفظون بملابس خروجهم إيماناً منهم بأن هناك حياة بعد الحظر.

**Translation:** In 2020, the ancient Egyptians kept their going-out costumes as a sign of their belief in life after the lockdown.

In this joke, there is a humorous observation as they named those people who will survive after the Coronavirus in the year 2020 as the ancient Egyptians. The humor arises from the irony that the ancient Egyptians, who lived thousands of years ago, believed in the concept of life after death and, thus, kept their burial clothes. However, in the context of the joke, it humorously suggests that the people who will survive till 2020, after the pandemic is over and the lockdown ends, will be keeping their going-out garments, showing their belief in a life after the lockdown and the disappearances of the virus. The joke humorously depends on the contrast between ancient beliefs in the afterlife and modern circumstances after the pandemic. There is an **ontological** metaphor in this joke as clothing is used as a symbol of social activities or events. The preserved clothes represent a

metaphorical expression of the anticipation and hope for life returning to normal after the lockdown. After death, ancient Egyptians were known for their belief in an afterlife, and, accordingly, they prepared for their burial rituals. By comparing this belief with the modern circumstances of the pandemic and lockdown, the joke highlights the endless feature of human beings of hope to survive and the capability to create humor from this unexpected relationship between two different periods of time and cultural practices.

5- علي فكرة انت طلعت سلبية وانت عديم المسؤولية وأناني ومتسلط ومهمل وعاش في الوهم ومبتفكرش غير في نفسك ومامتك هي اللي ممشياك يا مدام انا الدكتور وبقولك نتيجة التحليل.

**Translation:** By the way, you eventually become negative; and as for you, you are selfish, authoritative, negligent, living in delusion, only thinking about yourself, and your mother is leading you. Madam, I am your doctor, and I'm telling you the test result.

The joke plays with the semantic script of the unexpected twist of the doctor's medical test results and the misunderstanding of the patient who started to evaluate his personal qualities, thus creating the humor of the joke. In fact, the joke reflects a cultural awareness of the importance of test results as a form of evaluation. In this joke, the evaluation of both the doctor as well as the patient is used in humorous way, as the patient misunderstood the doctor's test result that she is negative and she thought he was criticizing her and accordingly, she started to criticize his personal qualities as if it was a scene between her and her husband in which they exchange accusations of their personal qualities in an exaggerated way creating humor. It is found that the joke employs the conceptual metaphor of test results as a metaphorical evaluation of someone's character traits. It is a **structural** metaphor that involves mapping an abstract concept, that is, the evaluation of medical results onto another abstract concept, that is, the evaluation of character traits. The negative evaluation mentioned by the patient is metaphorically associated to the idea of being "negative" in the medical result.

## ٦-نفتح تدريجي ، وزي ما تيجي تيجي و لا نفتح حبة حبة و اللي خايف يستخبي؟

**Translation:** The question is: Should we open gradually, and whatever happens, happens or should we open bit by bit, and those who are afraid, hide?

During the pandemic, the Egyptian government decided to make a complete closure for all the government offices, commercial centers, cafes, restaurants and others and the “Stay at Home” campaign became the slogan at that time. Then, the government changed its plan and started to ease its precautionary measures to face the virus by reducing the hours of the curfew and reopen commercial centers and other facilities gradually. Yet, this causes an increase in the number of infections. In spite of that, the government did not return back in its decision of easing the curfew measures. Instead, it stood in a gray area defending the necessity of keeping the wheel of production turning alongside with the coronavirus. During this gradual return to normal life, the Egyptians took the opportunity to make numerous jokes about the decision and the above joke is one of the jokes that was launched at that time. The joke plays on the script of gradually reopening after the lockdown and the fear people may have about it, suggesting that those who are afraid might hide or avoid the process of reopening. The joke, thus, reflects the cautious approach to reopening during the COVID-19 pandemic and the apprehension some people may feel about returning to normalcy. Moreover, it is noted that the joke does not rely on conceptual metaphor, however, it depends on rhyming words and repetition. These devices create a pleasant musical effect, aid memorability and increase the comedic sense in the joke.

٧-موضوع كورونا مش محتاج مسحات ودفع مبالغ طائلة ..هات حتة بسبوسة و حتة جبنة قديمة ودوق..  
لو الاتنين واحد يبقي سلم لي علي المترو

**Translation:** The coronavirus issue doesn't need swabs and overpayments. Just bring a piece of basbousa and a piece of old cheese and taste... If both of them taste the same, then you are doomed.

The joke subverts the expected script of testing for COVID-19 by humorously suggesting that instead of expensive COVID-19 tests and precautions, all that is needed to stay safe is a piece of basbousa (a Middle Eastern sweet) and a piece of

old cheese to taste. It highlights the absurdity of relying on unconventional methods for testing. In other words, it suggests that dealing with the coronavirus is not as complicated as it seems and compares it to tasting a piece of dessert and cheese. There is a conceptual metaphor as eating basbousa and cheese is metaphorically mapped onto the concept of a test for Coronavirus. It regards the physical action of eating these foods as though it were a test to find out if the virus is present or not. The metaphorical mapping in this example is **ontological** because it ascribes the concrete action of eating specific foods to the abstract concept of a diagnostic test. It suggests that consuming basbousa and cheese can somehow provide information about a person's Coronavirus status. In addition, the joke satirizes the difficulties and costs associated with COVID-19 testing, mocking the idea that a simple taste test could serve as a substitute.

٨- احب اشكر ظروف الحظر اللي خلتني اقعد في البيت مع اولادي و اكتشف اني معرفتش اربي

**Translation:** I would like to thank the circumstances of the lockdown that made me stay at home with my children and discover that I didn't raise them well.

The joke plays with the semantic script of staying at home during lockdown and spending time with one's children. The humor arises from the claim that the person discovered his lack of parenting skills during the quarantine. It is said that many parents spend most of their times at work thinking that all what their kids need is money and other material stuff and they express their care and love to them in this way, forgetting that their essential role is bringing up their children and raising polite children. During the lockdown, they discovered their children's misbehavior. Thus, the joke reflects a shared experience among many parents after staying at home and having the chance to spend more time with their children realizing that they need breeding. The conceptual metaphor in this joke is an **ontological** metaphor in which human-like characteristics are ascribed to abstract concepts. In this example, the metaphorical mapping occurs between the two abstract concept; namely the concept of circumstances and the abstract concept of gratitude. The joke proposes that the speaker has positive feelings towards the circumstances of the lockdown -which is, of course, of an irony-. Moreover, by showing gratitude towards these circumstances, the speaker metaphorically



personifies the circumstances as if they were a caring entity deserving appreciation.

٩-حكمة اليوم " يا ريت لو فيه لفظ خارج ياخذني معاه

**Translation:** Wisdom of the day: "I wish there was an 'outside word' that would take me out with it."

The joke plays on the expectation that the listener will depend on the literal meaning of the phrase (an outside word) 'لفظ خارج' which means a swear word to understand the joke. In this joke, the humorous twist arises from the literal meaning of the word which is 'outside' and he wishes to go outdoors. The joke reflects a shared experience that many people suffered from during the quarantine as they felt isolated and wanted to go outdoors with no cause. In this joke, the speaker expresses a desire for an outside word that would metaphorically take him with it outdoors, thus, highlighting the feeling of isolation and boredom. This metaphorical mapping suggests desire of the speaker to go outdoors with anyone because of his feeling of isolation during the lockdown. Here, the speaker depends on his intended meaning of the literal meaning of the word. It is an **orientational**.

١٠- ان شاء الله بعد ما نخلص من الكورونا حنقسم نفسنا اربع مجموعات...  
 الاولي حتروح لدكاترة جلدية علشان تتعالج من آثار الكحول والكلور.  
 الثانية حتروح لدكاترة نفسيين علشان تتعالج من الاكتئاب.  
 الثالثة حتروح لأخصائي تغذية علشان مش عارفين يطلعوا من الباب .  
 الرابعة حتروح للمحاكم علشان تخلص إجراءات الطلاق

**Translation:** God willing, after we get rid of the coronavirus, we will divide ourselves into four groups.

The first group will go to dermatologists to be treated from the effects of alcohol and chlorine.

The second group will go to psychiatrists to be treated from depression.

The third group will go to nutritionists because they can't fit through the door.

And the fourth group will go to the courts to complete divorce proceedings.

The joke refers to the potential consequences of the pandemic. It presents a script of dividing people into four groups based on their post-pandemic needs, for example, the first group will need dermatologists for alcohol and chlorine effects due to the intensive use of disinfectants, the second group will need psychologists for depression due to the long stay at home, the third group will need nutritionists for weight gain as due to the lockdown and lack of movement many people gained a lot of weight, and the fourth group will need courts for divorce procedures as divorce rates increased during the pandemic due to the lockdown and social distancing many couples spend increased amount of time together. This has, in many cases acted as an agent for break-ups. Therefore, the joke humorously addresses the potential consequences of the pandemic on various aspects of people's lives and the need for different professional services. The joke contains one conceptual metaphor as the expression “they can't fit through the door” is an **orientational** metaphor in which the expression those who can't fit through the door refers to obesity. Here, the metaphor utilizes the spatial concept of fitting through a door to refer to the concept of obesity.

١١- صديق لقيته منزل خبر مفرح وسط الاحداث دي كلها .. عملت له بلوك .. هو دا وقته

**Translation:** I found a friend who posted good news amid all these events... I blocked him... It is not the right time.

The joke refers to the script of blocking or unfollowing a friend on social media. It humorously suggests that the person blocked his friend precisely when he found that his friend shared good news on social media. Moreover, the joke reflects the humorous nature of social media interactions and the tendency to block or unfollow people at unexpected moments, even when they have good news to share. To block someone nowadays, becomes a modern means of expressing upset or anger towards a friend, particularly in situations where direct communication may be difficult or unwanted. In the past, people may have expressed their dissatisfaction or anger through different means, such as avoiding

or ignoring the person, confronting them face-to-face, or using other means of communication like phone calls or letters. The joke plays on the metaphor of "block" meaning to prevent or hinder someone from doing something. In this context, the speaker metaphorically blocks his friend after sharing good news due to the current situation of COVID-19. In this sentence, the metaphorical mapping occurs between the concrete action of blocking someone (in a digital or social media context) and the abstract concept of (preventing someone from interacting with a friend). This usually happens when someone feels that blocking is the best course of action that can maintain privacy, safety or emotional well-being. It is a **structural** metaphor as it establishes a relationship between two concepts.

١٢- اكتشافات في الأسبوع الأخير  
 عدد بلاطات السيراميك في الشقة ٦٢٠ بلطة  
 سلك الدش حوالين الحيطان ٩٠ متر  
 وزن ترابيزة الصالون اقل من وزن كرسي الانتريه بمقدار كبايتين رز  
 درج التلاجة ببشيل ٢٠ ليمونه و ٩٠ خياره بالطول او ٥٥ بالعرض  
 لقيت ٧ فرد شباشب مالهمش دعوة ببعض

**Translation:** Discoveries in the past week:

Number of ceramic tiles in the apartment: 620 tiles.

The length of the satellite dish cable: 90 meters.

The weight of the living room table is heavier than the weight of two cups of rice compared to the weight of the sofa.

The refrigerator drawer can hold 20 lemons and 90 cucumbers lengthwise or 55 cucumbers widthwise.

I found 7 pairs of slippers that have nothing to do with each other.

In this joke, the script revolves around the notion of unexpected discoveries or observations related to the quarantine and lockdown. Each line presents a different aspect of the speaker's recent findings, ranging from the number of ceramic tiles in the apartment to the peculiarities of household objects. The punchline highlights the absurdity of the discoveries, because of the free time that people have during the quarantine to the extent to find out all these discoveries. The metaphorical aspect in this joke is primarily **structural**. The script draws on

the conceptual framework of unexpected or surprising findings related to COVID-19 and presents them as humorous observations. The speaker uses exaggerated or incongruous comparisons to highlight the unusual nature of these discoveries, such as comparing the weight of a table to cups of rice or the capacity of a refrigerator drawer to hold lemons and cucumbers. The joke uses orientational metaphorical comparisons between different objects and their quantities and weights, highlighting the relative sizes or amounts of each item. This plays on the metaphor of size and weight in relation to each other.

١٣-يا ريت اللي حيفضل لآخر ٢٠٢٠ يبقي يطفى النور ويتمم علي محبس الغاز ويقفل الباب وراه

**Translation:** "I wish that whoever remains until the end of 2020 turns off the lights, closes the gas valve, and locks the door behind him."

In this joke, the script revolves around the idea of being the last person still alive at the end of 2020 after many others have died due to coronavirus. It reflects a cultural context where people have experienced the impact of the COVID-19 pandemic and its associated challenges and losses and it highlights a feeling of frustration. The humor lies in the dark irony of the situation. The setup implies a request or wish for the person who remains alive to perform certain actions. These actions include turning off the lights, closing the gas valve, and locking the door behind him. These are actions that always people do when they are travelling leaving their home for a long time to maintain safety of the home. The script plays on the notion of the last survivor taking responsibility for these tasks. It is found that the metaphorical aspect of this joke is primarily **ontological**. It frames the experience of living through the COVID-19 pandemic as a journey or passage of time. The concept of "the last one to be alive" is metaphorically understood as reaching the end of this journey. The actions of turning off the lights, closing the gas valve, and locking the door are metaphorical representations of bringing closure to a period of time or event. The joke relies on the metaphor of taking precautions to ensure safety. It suggests that the person who will continue living until the end of 2020 should take extra safety measures.

١٤-قعدت اكلح في الشغل عشان يمشوني بدري.. مشوني خالص

**Translation:**

"I pretended to cough at work so they would let me leave early... They dismissed me."

In this joke, the script revolves around the concept of coughing at work with the expectation of leaving early. The setup expresses the speaker's intention of coughing (as a sign of being sick) at work, hoping that he would be allowed to leave early. However, the punchline subverts this expectation by saying that they fired him. The script plays on the anticipation of a certain outcome and the humorous twist of that outcome was more than expected. The metaphorical aspect in this joke frames the act of coughing at work as a strategy to achieve a desired outcome, which is leaving early. The conceptual metaphor in this expression is **orientational**. It involves expressing how the work is boring and bureaucratic by the mapping of physical symptoms or actions through coughing onto the concept of strategic maneuvering or achieving a desired outcome. It allows for the expression of a lighthearted or humorous perspective on a situation where someone may use a physical symptom as a means to achieve a particular result which was not successfully done as he wished.

١٥- محتاره البس ايه بكره وانا خارجة للرسبشن

**Translation:**

"I don't know what to wear tomorrow while I am going out to the reception area".

In this joke, the script revolves around the concept of getting ready to go out and choosing an outfit. It plays on the humorous unexpected twist that the speaker wants to go out as he/she gets bored from staying at home during the lockdown, however, the humor arises in the punchline subverting the expectation that it is the reception area at home that the speaker is going to, not outdoors. The script plays on the contrast between the speaker's initial assumption of a formal occasion outdoors and the reality of a more relaxed environment indoors at the reception. The metaphorical aspect of this joke is primarily **structural**. It frames the act of choosing an outfit as a preparation for an outgoing event. The concept of "going to the reception area" is metaphorically understood as attending a formal

gathering or meeting. The punchline subverts this metaphorical expectation by suggesting that the reception area is not a formal event to wear an outfit, highlighting the humorous contrast between the speaker's assumptions and the reality.

١٦- واحد صاحبنا من كتر قعدته في البيت مع مراته حبها و عرض عليها الزواج

### **Translation:**

"Our friend, due to spending a long time at home with his wife, falls in love with her and proposes to marry her."

In this joke, the script revolves around the concept of a person spending a lot of time at home with his spouse during a period of quarantine. Due to spending this long time with her, a feeling of love with her was developed. The punchline subverts the expectation by indicating that the friend proposes to marry his wife, despite already being married to her. The script plays on the absurdity of proposing marriage to someone who is already married to, highlighting the humorous twist. The metaphorical aspect of this joke is primarily structural. It frames the act of proposing marriage as an expression of deep love and commitment due to the extended time spent together between the husband and wife as if they were strangers and they get to know each other. The joke mocks the excessive time spent at home during the COVID-19 pandemic as if it were a romantic relationship leading to falling in love and proposing marriage to his already-married wife. The **ontological** metaphor attributes the abstract concept of falling in love and proposing marriage to the concrete action of spending time with the wife. It allows for a playful and exaggerated representation of the impact of spending time together on the dynamics of a relationship.

## **9. Results and Findings**

Based on the analysis of the American and Egyptian jokes provided above, several findings can be observed:

### **9.1. First: The Frequency of the Types of Conceptual Metaphors Used**

The following table represents a comparison of the frequency of the types of conceptual metaphors used in both American and Egyptian jokes.

	Structural	Frequency	Ontological	Frequency	Oriental	Frequency	No rely on metaphors	Frequency	Total
American jokes	4	25%	6	37.5%	4	25%	2	12.5%	16
Egyptian jokes	4	25%	8	50%	3	19%	1	6%	16

Table (1): The frequency of the types of conceptual metaphor used

According to the previous table, it is noticed that ontological metaphor is the most frequently used both in American (37.5%) and Egyptian jokes (50%), whereas structural and orientational metaphors are less used. The frequent use of ontological metaphors can be indicative of several factors. First, it draws upon everyday human experiences and emotions, making them relatable and easily understandable to a wide audience. Given the widespread impact of COVID-19 and the shared experiences of people during the pandemic, ontological metaphors provide a common ground for humor. Second, ontological metaphors often tap into deep emotions and human relationships, allowing jokes to evoke empathy, amusement, or even purgation. According to the provided jokes, it is noted that the use of ontological metaphors addresses the emotional aspects of the pandemic, such as fear, anxiety, or frustration. Another important factor concerning ontological metaphors is that they simplify complex concepts or situations by using familiar objects or relationships as seen in the provided examples above. The COVID-19 pandemic has brought about numerous intricate and challenging circumstances, and using ontological metaphors helps to make them more accessible and easier to grasp in a joke.

In respect to structural and orientational metaphors, it is found that they are less used in the provided jokes due to their abstract nature or the need for a more subtle understanding of the underlying concepts. Structural metaphors involve mapping one domain onto another, while orientational metaphors relate to spatial orientation and directionality. These two types of metaphors may call for a deeper level of analysis or understanding with the specific domains being mapped, thus resulting in making them less suitable for quick, lighthearted jokes.

## 9.2. Second: The Cultural Differences of American and Egyptian through the Use of Conceptual Metaphors

The following table (2) represents the conceptual metaphors in the American jokes

The conceptual metaphor	Target domain	Source domain
Humans are dogs	humans	dogs
Washing hands is the customary tradition of celebrating birthday	Washing hands	Celebrating birthday
Throwing a dart is like selecting a travel destination	Throwing a dart	Selecting travel destination
Lying in bed is like saving the world	Lying in bed	Saving the world
Social distancing is like buttons on a shirt that are far apart	Social distancing	Far apart buttons of a shirt
A talkative child is an insane parrot	Talkative child	Insane parrot
Quarantine is making inside jokes	Quarantine	Inside jokes
Attributing human-like understanding to animals	Human-like understanding	Animals



Relaxing on a coach is a tense	Relaxing on a coach	A tense
Attributing human emotions and thoughts to animals	Human emotion and thoughts	Animals
Bathroom scale is a person	Bathroom scale	Person responding
Mental act of deciding what outfit to wear is like having control and choice during lockdown	Deciding what outfit to wear	Having control and choice during lockdown
Eating raw garlic is a social distance measure	Eating raw garlic	Social distance measures
A COVID-19 joke is a tasteless food	A COVID-19 joke	A tasteless food

The following table (3) represents the conceptual metaphors in the Egyptian jokes

The conceptual metaphor	Target domain	Source domain
The concept of time as a physical entity that can be measured by washing hands for 20 seconds	The concept of time as a physical entity	Washing hands for 20 seconds
Attributing human characteristics to the virus	Attributing human characteristics	Virus
Wearing a mask is a disguise	Wearing a mask	Disguise
Clothing is a symbol of social activity	Clothing	Social activity
Evaluation of medical test results is an evaluation of character traits	Evaluation of medical test results	An evaluation of character traits

Eating specific foods is a diagnostic test	Eating specific foods (Basbousa and cheese)	Diagnostic test
Attributing human-like qualities to the concept of circumstances	Circumstances	person
The expression can't fit through the door means obesity	The expression can't fit through the door	obesity
Blocking is preventing interaction	The concrete action of blocking	Preventing interaction
Free time leads to discoveries	Free time	Discoveries
Life during COVID-19 pandemic is a journey	Life during COVID-19 pandemic	Journey
Coughing is a strategic maneuvering to achieve an outcome	Physical symptoms or actions (coughing)	Strategic maneuvering to achieve an outcome
Choosing an outfit is a preparation for a social event or activity outdoor	Choosing an outfit	A preparation for a social event or activity outdoor
The abstract concept of falling in love is spending time with the wife	The abstract concept of falling in love	Spending time with the wife

As shown from the above two tables, it is noticed that the conceptual metaphors used in the American and Egyptian jokes reflect cultural differences in the way these metaphors are constructed and understood. The metaphors in the American jokes, on the one hand, reflect cultural affinity towards pets and the use of animals as metaphors for human behavior is a distinguishing feature. Moreover, the rest of metaphors are related to personal experiences and emotions during quarantine. In addition, other metaphors draw on everyday objects such as buttons of a shirt or a bathroom scale. Overall, the metaphors used in American jokes

reflect situations in American culture. The metaphors in Egyptian jokes, on the other hand, attribute human characteristics or emotions to abstract concepts like time, circumstances and the virus itself. This reflects a cultural inclination towards personification. Moreover, there are also metaphors related to clothing and food to symbolize social activities which emphasizes the importance of social interaction and the use of food as cultural reference in Egyptian society. In addition, using metaphors that are related to spending time with a spouse reflect a cultural emphasis on family and relationships. Accordingly, the differences between conceptual metaphors in American and Egyptian jokes reflect the cultural perspectives of each society, highlighting the unique ways in which humor is expressed in both societies.

### **9.3. Third: The Utilization of the Semantic Script Theory of Humor**

Applying the Semantic Script Theory of Humor on the collected data of the American jokes, it is found that the provided jokes subvert social scripts and introduce humorous alternatives. The established social script for humans during quarantine in these jokes involve staying at home, practicing social distancing, and adapting to a more restricted lifestyle. Most of the jokes compare between one of these situations with an unexpected situation. They subvert expectations, rely on shared experiences, and employ exaggeration to create humor. By highlighting the similarities between the two situations, a humor is created. Moreover, it is noteworthy that the shared cultural knowledge plays a significant role in understanding the jokes as they have strong cultural references and they rely on shared cultural, experiences, and norms to create humor. These references include cultural expectations, societal beliefs, everyday situations, customs, traditions, or stereotypes. These cultural references allow the reader to recognize the nuances, meanings, and humor embedded within these references, facilitating a more comprehensive understanding of jokes and their cultural significance.

Similarly, the Egyptian jokes also rely on the Semantic Script Theory of Humor, subverting social scripts and introducing humorous alternatives. The

jokes reflect a cultural understanding of hygiene and cleanliness, public awareness, the importance of wearing masks, and the significance of test results as a form of evaluation. These jokes tap into shared cultural knowledge and experiences, making them relatable to Egyptian readers. Moreover, the humor in these jokes arises from unexpected twists or contrasts between expected and actual behaviors or outcomes. The unexpected elements create surprise and amusement for the reader, highlighting the incongruity or irony in the situations presented. The jokes are rooted in the cultural context of Egypt, referencing specific cultural practices, beliefs, or shared experiences related to the COVID-19 pandemic and its impact on daily life. They reflect the unique perspectives and coping mechanisms of Egyptians during this time.

According to these findings, it can be said that they indicate that the jokes serve as a form of cultural expression, enabling both Americans and Egyptians to find humor and make sense of their experiences during the COVID-19 pandemic. They provide a means of communication, reflection, and commentary on various aspects of life and society amidst difficult circumstances.

#### **9.4. Fourth: Topics and Themes of the Jokes:**

Upon examining the topics or themes of the jokes, it is found that both American and Egyptian jokes cover a variety of themes. The American jokes, on the one hand, cover themes such as daily life during quarantine such as house cleaning, parenting and children, weight gain, fashion choices, health measures, and homeschooling besides psychological factors such as emotional eating, pet interaction during quarantine, stress relief, and other topics such as travel plans and productivity during quarantine.

The topics of the Egyptian jokes, on the other hand, involve different aspects of life such as public awareness and health guidance, parenting and children, predictions about post-pandemic scenarios, coping mechanisms and social media interaction during the quarantine, and expressing frustration. According to the topics covered, it is noted that both American and Egyptian jokes share some

common topics that are related to health measures, parenting and children, expression of frustration and coping mechanisms. The choice of these topics allows the jokes to tap into various aspects of human experiences, cultural references, and shared knowledge. They draw on familiar scenarios, social norms, and common understandings to create humor through unexpected twists, incongruity, and subversion of expectations.

## **10. Conclusion:**

Overall, this study highlights the techniques and strategies employed in both American and Egyptian jokes to create humor. The jokes tend to use different techniques ranging from semantic scripts to cultural contexts, shared experiences, and conceptual metaphors to create humor. All these factors play significant roles in generating laughter. It demonstrates the importance of surprise, exaggeration, metaphorical connections, and cultural context in generating humorous effect and engaging the reader's sense of amusement. It is obvious that all the jokes rely on the Semantic Script Theory of Humor, which involves subverting social scripts of expectations to create humor. Many jokes rely on the deviation from established social norms, such as unexpected behavior or situations. This indicates that humor often arises from contrast, surprise, and the violation of expected patterns.

In addition, the majority of jokes invoke conceptual metaphors of different kinds ranging from ontological to structural and orientational metaphors. The reliance on conceptual metaphors is obvious as the utilization of semantic scripts. Moreover, different topics and themes are covered in the collected data of the jokes as they cover a variety of aspects of human experiences, cultural references, and shared knowledge that most Americans and Egyptians know. These topics range from everyday situations (hygiene, wearing masks), social issues (public awareness, lockdown), cultural references (ancient Egyptian beliefs), and interactions with professionals (doctors, medical tests).

Finally, it can be said that American humor, on the one hand, draws on a wide range of societal norms and behaviors, and often employs cultural knowledge and shared experiences. Egyptian jokes, on the other hand, draw heavily on cultural

references, as well as social and historical issues. It tends to be more focused on wordplay and irony. However, the common factor in both American and Egyptian jokes is the anxieties and difficulties of living through a pandemic which are clearly reflected in the jokes.

## List of Abbreviations

Semantic-Script Theory	SSTH
Conceptual Metaphor Theory	CM
General Theory of Verbal Humor	GTVH
Ontological Semantic Theory of Humor	OSTH
Language	LA
Narrative Strategy	NS
Target	TA
Situation	SI
The Logical Mechanism	LM
Script Opposition	SO
Knowledge Resources	KR

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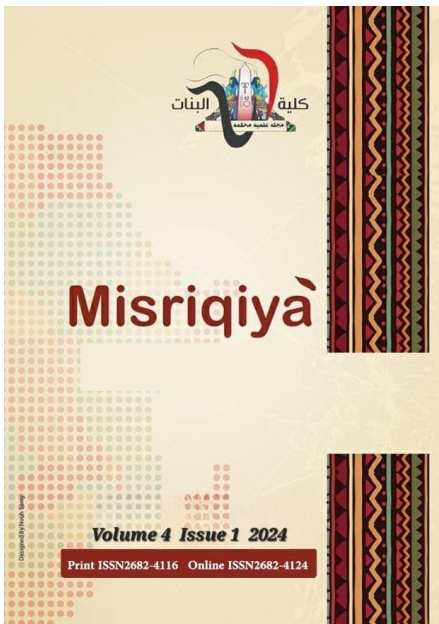
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## Resurrecting the Past to Find the True African American Identity: *Gem of the Ocean* by August Wilson

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### Abstract

This paper aims to trace the principal characteristics of Afrocentricity in August Wilson's play *Gem of the Ocean* which is wonderfully rich with the intricate layers of the African American pre- and post-slavery experience. It presents a close study of the African American's Masterpiece in a thematic approach to show how history, culture and community are rooted in the African American identity. Afrocentricity is used in this paper to provide a vehicle for analysis relevant specifically to the African and African American experience – particularly in the areas of history and cultural studies – for African Americans. The play provides ample layers of interesting topics namely violence and spirituality. The violence that runs through different incidents in the play is the violence of the oppression of African Americans, which kept them in poverty powerless to control their fate. The spirituality of the characters provides them with strength which they have brought along from their journey across the ocean. Rewriting history through this play comes as an eye-opener to the wrongs and struggles the African ancestors endured for their grandchildren to enjoy a better life. Going back to the roots of the African tribes proves that this race once enjoyed a culture and a solid identity that has disintegrated and somehow vanished over the years. Written in 2003, the play presents the severe racial discrimination and poverty conditions African Americans suffered from. The journey on board the 'Gem' or the slave ship across the ocean shows the degradation of slave life encompassing violence, isolation and utter despair to reach both a metaphorical and physical shore.

**Keywords:** *Afrocentricity, African American Studies, Drama*

## **Resurrecting the Past to Find the True African American Identity: *Gem of the Ocean* by August Wilson**

Afrocentricity is the study centered and derived from Africa or the African population emphasizing the African culture and the contributions of Africans to the development of Western civilization. It highlights the impact the African people made and still are making on the West affecting its culture and literary composition. It is designed to empower the people who are suffering from the African diaspora. “A central premise behind it is that many Africans have been subjugated by limiting their awareness of themselves and indoctrinating them with ideas that work against them” (Asante, 1998, p.1) and misrepresent them to the rest of the world. The representation of the African American identity has long been an important issue tackled, explained and analysed by many writers over the years. Many authors like, Baldwin and Hamilton, have tried to present an equitable society by showing revolutions for justice and liberty. August Wilson is one of them. He believed in Molfi Asante’s powerful words that it is a “fundamental fact that culture is at the base of all values” (Asante, 1998, p.1). He shows how human regeneration with all its interests, values and perspectives highlight the African identity that has been mutilated, changed and misrepresented over the years. He strongly projects the idea that people are deeply rooted and connected with their culture and heritage, hence internal peace and self-acceptance can only come after going back, realising, acknowledging, and embracing this inherited past.

Afrocentricity with its basic interest in: history, culture and community was first presented by Asante in the 1970’s. Names such as ‘Africentricity’, ‘Afracentricity’, ‘African-centred’ and ‘Africology’ embraced by many like Cheikh Anta Diop, Maulana Karenga and Ama Mazama gave birth to a school of thought and later an acknowledged critical school that represents the African American identity from a historical and cultural perspective. History blended with the original roots of the ancestors presented in this context the perfect marriage and consequently the birth of a strong and fulfilled identity.

Asante defines Afrocentricity as “placing African ideals at the center of any analysis that involves African culture and behaviour” (1998, p.2). He claims that “the best road to all health, economic, political, cultural, and psychological in the African community is through a centered positioning of ourselves within our own

story” (Asante, 1998, p.vii). He views it as “a philosophical paradigm that emphasizes the centrality and agency of the African person within an historical and cultural context” (Asante, 2021, p.84). It involves a “continual reference to African ideas, cultures, and histories as backdrops to the alternative construction of knowledge” (Hall, 2010, p.24). Thus being African American should be an addition if one accepts the African past and embraces the American present.

The first difficulty that stands in the way of achieving a separate African American culture “arises from the fact that the original African culture of the American Negro is very largely lost” (Whetherford, 1934, p.545). Based on an oral tradition and a folkloric culture, much of the original heritage was either lost or changed through assimilation into other cultures. For most African Americans, part of their freedom is to be able to distinguish their own authentic culture from the American culture. This issue of identification and learning more about the origins of African-ness rests at the heart of the identity struggle. Brought as illiterate slaves and denied their own culture, the oral tradition of the original African Americans with the “absence of written record” implied an “absence of anything worth recording” (Silberman, 1964, p.175). Hence an imposed cultural identity became the general assumed one that should be adopted, believed and lived by in complete subordination and acceptance, as opposed to a forgotten shameful past that should and must be kept in the dark.

In addition to physical relocation, African Americans were forced into a foreign society which imposed on them certain behavioural patterns. Asante explains this stating:

Central to the Afrocentric idea is the fact that Africans were moved off intellectual, philosophical, and cultural terms by enslavement and colonization. In order to return to an authentic consciousness rooted in self-respect and affirming dignity, it is necessary for African people to see themselves in the midst of their own history and not as located in the margins of Europe. (Asante, 2021, p. 90)

By going back to their origins and cultural heritage, African Americans are able to find their true identity and consequently inner peace in their community. The representation of African Americans in literary works to the world aimed primarily to dismantle “prevailing Eurocentric bias ... which have regularly distorted, marginalized, or negated the agency and humanity of blacks and all marginalized ‘others’” (Hall, 2010, p.25). Consequently, with the political



banishment of slavery, African Americans had to fight against another form of injustice, namely racial discrimination against their race. They “have been forced to fight for cultural empowerment to gain independence from colonization of the white power structures that dominate American culture” (Marks, 2013, p.483). Fighting to define the self and project an identity became both an internal and external struggle, one within and the other without in a society which already set the parameters of classification and judgement terms denying all humanistic rights and practices to African American subjects living on American soil because of their African origin.

Afrocentricity hence became a celebration of the uniqueness of the African culture and heritage carried from one generation to the next. It is not the misrepresented image of the barbaric African savage or slave. August Wilson is one of the playwrights who captures this reality and succeeds in giving a true presentation of the authentic African descent. The stereotype of the African man transcended the imposed boundaries of inferiority and neglect to raise up to the level of proper self-assertion and representation where respect becomes the core of understanding and communication. He successfully portrays the modern African American who comes from and eventually ends up in the ‘City of Bones’. He proudly celebrates his past and is optimistic about his present and future in spite of all of the deconstructive hardships, pain and humiliation either, physical or spiritual.

This paper presents a close study of August Wilson’s African American masterpiece *Gem of the Ocean* in a thematic approach to show how history, culture and community are rooted in the African American identity. By using Afrocentricity, as a school of thought, the play provides ample layers of interesting topics presented in it. Rewriting history through this play comes as an eye opener to the wrongs and struggles the African ancestors endured for their grandchildren to enjoy a better life. Going back to the roots of the African tribes proves that this race once enjoyed a culture and a solid identity that has disintegrated and somehow vanished over the years.

Written in 2003, the play presents the severe racial discrimination and poverty conditions African Americans suffered from. The journey on the ‘Gem’, or on board the slave ship in the ocean shows the degradation of slave life encompassing violence, isolation and utter despair to reach both a metaphorical and physical safe shore. Wilson discusses the struggles and miserable conditions of African

Americans in the United States during the twentieth century in his ten-play cycle covering the period from the 1900s to 1990s. Africa to him, like his fellow Afrocentrists, is the mother land, the backbone from which strength, knowledge and healing is taken. In *Gem of the Ocean*, he closely follows the characteristics of Afrocentricity. He revisits the past to reconstruct a future through building the bridge of reconciliation between an undeniable hurtful truth and an optimistic hopeful future. His characters; ‘Aunt Ester’ and ‘Solly Two Kings’ take us on a journey to the past only to reconcile the young generation presented by ‘Black Mary’ and ‘Citizen Barlow’ with their culture. Like all Afrocentric writers, Wilson manages to relocate the younger generation in the center of their history as subjects rather than objects. This is done with the help of the oral tradition and songs which remind them with their African-ness. Along with establishing the connection with the ancestors and their past, Wilson also gives the young generation the responsibility to continue the quest or journey of the elders. Black Mary and Citizen Barlow are both at the heart of action, in the center, just as where Wilson believes each African American should be. Repetitive pictures of the past African culture and folkloric songs highlight the individuality of the African American population. Wilson’s characters revolt against racism and use culture as an important weapon to demolish the black stereotypes enforced by the discriminating American society. Wilson presents in his play typical Afrocentric themes: violence, spirituality, oppression, racial discrimination, poverty, ignorance and powerlessness which put some characters in a state of utter devastation to the extent of choosing to take their own lives since they have nothing left to live for while others choose to endure the struggle and challenge the social norms to try to live a better life.

*Gem of the Ocean* is the opening play in the ten-play series written by August Wilson. Wilson introduces in his opening lines a picture of the miserable life of African Americans during the era of the First Migration. The title of the play refers to the paper boat made by Aunt Ester out of a bill of sale given to her when she was still a slave. Using this metaphorical boat, she sends a troubled young man, Citizen Barlow, for an inner spiritual journey to wash his sinful soul (for killing a human soul) and to connect with his past and establish an acceptance of his life. His voyage is represented by this paper boat. As Aunt Ester narrates her story of how she was brought to the land of the free as a slave, she hands Citizen a small paper boat to hold in his hands and never to let go. She launches him on a journey on board of this legendary boat to visit the city of bones. A journey which is

intended to cleanse his soul and give him a reason to live and carry on what is expected of him. Aunt Ester tells Citizen that this is:

... not what you call your ordinary boat. Look at that boat, Mr. Citizen. That's a magic boat. There's a lot of power in that boat. Power is something. It's hard to control but it's hard to stand in the way of it. (Wilson, 2006, p.54)

She physically folds and uses her bill to spiritually reconnect Citizen to the ancestral past. She tries to teach Citizen who belongs to the new and younger generation that African Americans should not forget their past and their origins. Ester's bill of sale is not simply a piece of paper, it is a living proof of the struggle and the survival of the dire circumstances freedom was achieved through.

Wilson recalls in the play the Middle Passage journey African Americans physically took to arrive as slaves. The play describes the severe racial discrimination and poor conditions they had to endure. Berlin in his essay 'Coming to terms with slavery in 21<sup>st</sup> century America' explains how the "Evidence of the degradation of slave life was everywhere. Violence, isolation, exhaustion, and alienation often led African slaves to profound depression and occasionally to self-destruction" (Horto, 2006, p.13).

Asante explains that one can find the roots of Afrocentricity in "the intellectual and activist precursors" like Frantz Fanon, Malcolm X, Larry Neal and W.E.B. Du Bois "who first suggested culture as a critical corrective to a displaced agency among Africans" (1998, p.37). In the *Gem of the Ocean* we have a found identity which was once lost in slavery of the whole community of the African American body and an individualised identity which is born out of an old generation which has suffered and paid a dire price for the young to survive. Through the main character of Aunt Ester, the need to stress "the necessity for a recentering of African minds in a way that brings about a liberating consciousness" (Asante, 1998, p.38), Wilson presents this character as an anchor character. This old woman provides comfort to all the wondering lost and confused souls who come seeking her help. She represents the connection with a past that is almost forgotten by the present. Aunt Ester's question to Black Mary: "What took you so long?" (Wilson, 2006, p.74) reveals the birth of the new generation which sprouts from the former's womb. Physical survival is followed by spiritual rebirth and ultimate identity awareness of a population which was once inhibited and suppressed to the extent of complete submission to the white master.

The internal struggle of the African American character is presented in the play where we see how the African American character suffers from a duality of what Du Bois in his book *The Souls of Black Folk* describes as having “double-consciousness, (a) sense of always looking at one’s self through the eyes of others” which causes him to live in “ambiguity” when he “feels his two-ness, an American, a Negro; two souls, two thoughts, two unreconciled strivings; two warring ideals in one dark body, whose dogged strength keeps it from being torn” (1973, p.3). The name African American assumes two special places, two locations, two cultures, an old one and a new assimilated one and a double heritage. This struggle pushes the characters on a journey of self-exploration, of finding value and meaning to their living. And it is not until they resolve the feeling of non-belonging and internal loss that they are reconciled with their past, centered within and reconnected with their heritage and long lost culture. The ‘two-ness’ disappears with the idea of acceptance of who they really are and the embracement of the African roots. Wilson’s play:

aims at accomplishing three major objectives – first, the depiction of Africans, and peoples of African descent abroad, as historical actors. Second, the rehabilitation and exaltation of the historical and cultural heritage, and experiences of Africans and Blacks in Diaspora. Third, the location of Africa as the foundation of knowledge about Blacks (Adeleke, 2001, p.22)

The play presents a spiritual journey taken by the leading character: Citizen Barlow, a young African American, who is aided by Aunt Ester, the old African American lady who lives in 1839 Wylie Avenue in Pittsburgh. She lives with Eli, the gatekeeper and Black Mary, her housekeeper. Solly Two Kings and Rutherford Selig are recurrent visitors and friends to Aunt Ester’s house. Solly is described as a potential suitor to Aunt Ester while Selig is the only White man in the play. Wilson shows how his whiteness is accepted and even welcomed as he is approached by the household to help Solly escape the ruthless Caesar, the black policeman. His character juxtaposes that of Caesar who is Black on the outside but racist from the inside. He represents the white unjust laws against his fellow brothers. His motivation comes from his love of power and greed for more money which changed him over the years. He becomes a suppressive tool for the White racist people under the umbrella of practicing the law.

Through the belief of the power of culture and how it is capable of bridging the gap between the “American South of the slave past and modern day

Pittsburgh” Wilson makes his characters embrace “the past in order to move forward” (Gantt, 2009, pp.12-13). A resurrected cultural identity of African Americans is the most appropriate weapon to fight racism. Aunt Ester’s character is the most centralized African American in Wilson’s play. She represents the 285 years ex-slave experience. She is presented in the play as the representative of African American heritage and the distant voice of Africa. Her house is a refuge to all those who need salvation and inner peace. She is believed to be capable of “wash(ing) people’s souls” (Wilson, 2006, p.20). Her connection with other characters is motherly, representing mother Africa who guides, loves and supports her children. Citizen, like many other young lost men, comes to her for finding a meaning for his life and filling the hole in his heart made by the unintended death of another man. Aunt Ester’s words in the play to Citizen explain it all:

It’s only a half mile by a half mile but that’s a city. It’s made of bones. Pearly white bones. All the buildings and everything is made of bones. I seen it. I been there, Mr. Citizen. My mother live there. I got an aunt and three uncles live down there in that city made of bones. You want to go there, Mr. Citizen? I can take you there if you want to go. That’s the center of the world. In time it will all come to light. The people made a kingdom out of nothing. They were the people that didn’t make it across the water. They sat down right there. (Wilson, 2006, p.52)

Aunt Ester and Citizen’s common ancestors have built the ‘city of bones’ with their own sacrificed bodies. Wilson shows how the city has become the ‘center’, the heart of Afrocentricity. All those who have died during the Middle Passage journey or other similar physical journeys have joined those who metaphorically ‘live’ in the ‘city of bones’. They transcend bodily existence and physical grave limitation to soar spiritually to the center of the world, to ‘live’ united in a city where no human can impose his unjust rules.

Citizen Barlow, Wilson’s African American character shows how he and his fellow citizens have become “subjects rather than objects” in their world. The concept of “a centrist world view and cultural perspective which makes the observers subjects in their own discourse” became “the starting point of Afrocentric theory” (Akinyela, 1995, p.23). In his conversation with Solly, he explains how he got his name:

Solly: My name is Two Kings. Used to be Uncle Alfred. The government looking for me for being a runaway so I changed it.

Citizen: My mama named me Citizen after freedom came. She wouldn't like it if I changed my name.

Solly: Your mama's trying to tell you something. She put a heavy load on you. It's hard to be a citizen. You gonna have to fight to get that. (Wilson, 2006, p.26)

Citizen flees the South, Alabama, in search for a new better life but the bitter truth awaits him in Pittsburgh. He seeks Aunt Ester's spiritual help after stealing a bucket of nails from the town mill and becoming the main reason why another man, Gareth Brown, was accused of the theft and consequently loses his life defending his stance. His imaginary spiritual journey to the 'City of Bones' described by Caywood and Floyd as: "the vast, underwater graveyard for the thousands of ancestors who died crossing the Atlantic on their bloody journey into slavery" (2009, p.75) becomes a continuum of the Middle Passage experience. The "Middle Passage thus emerges not as a clean break between past and present but as a special continuum between Africa and the Americas" (Diedrich, 1999, p.8).

The spiritual journey is a wake-up call to the other characters in the play. Aunt Ester tells Citizen that when she felt alone on the ship of slaves across the ocean, she started singing: "just singing quietly to myself some song my mother had taught me. After that it was alright for a little while" (Wilson, 2006, p.53). Songs magically connect the young generation with the past and Wilson associates the crucial moments in the play with songs because of their importance in forming the African American identity. It is the song, the "African lullaby ... a song his mother taught him" (Wilson, 2006, p.67) that re-centers Citizen and brings him back to the balancing point on the imaginary ship journey. Aunt Ester sums up Citizen's role or right in life, she addresses him explaining: "Life is above all. God raised it to a great height. Live, Mr. Citizen. Live to the fullest. You got a duty to life. So live, Mr. Citizen. Live!" (Wilson, 2006, p.68) and Eli's eulogy over Solly's shot dead corpse summarizes the great battle of what Afrocentricity is all about:

They laid him low. Put him in the cold ground. David and Solomon. Two kings in the cold ground. Solly never did find his freedom. He always believed he was gonna find it. The battlefield is always bloody. Blood here. Blood there. Blood over yonder. Everybody bleeding. Everybody been cut and most of them don't even know it. But they bleeding just the

same. It's all you can do sometime just to stand up. Solly stood up and walked.

He lived in truth and he died in truth. He died on the battlefield. You live right you die right. (Wilson, 2006, p.83)

Physical death leads to spiritual rebirth in Wilson's play. Garret Brown and Solly physically die for Citizen to be spiritually reborn. The 'two pennies' are passed on from a physical materialistic context to a spiritual burial ritual. They are returned by Citizen to Solly to culminate the burial ritual. And by doing so, Citizen becomes the new Solly. He states: "They all look like me. They all got my face!" (Wilson, 2006, p.66) acknowledging the connection, bond and responsibility. He realizes the three main themes Wilson highlights in the play: the significance and importance of the African heritage and culture, the reconciliation with the past and embracing the idea of being part of the whole Black community, to take power and support from.

Asante explains that "the Afrocentric idea, in education seeks to reposition Africans at the center of (their) own historical experiences rather than on the margins of European experiences" (2021, p.35). The letter delivered from Solly's sister from the South is a clear example of how they need to educate themselves.

I am writing to let you know the times are terrible here the most anybody remember since bondage. The white peoples is gone crazy and won't let anybody leave. They beat one fellow on the road so bad his mama say "Who is he?" They killed some more and say the colored can't buy tickets on the train to get away. Say they will sink the ferry if any colored on it.

I want to leave to come North but it is too bad. (Wilson, 2006, p.15)

Solly is unable to read the letter himself and Black Mary aides him to learn about important information by reading it out loud for him. The older generation is illiterate and this comes as a physical impairment. Yet Solly is not afraid and is determined to travel South to rescue his sister.

The act of setting restricting physical boundaries rises once more with the hunt of Solly by Caesar: "all the roads blocked off" (Wilson, 2006, p.75) and "looking for whoever burnt down the mill" (Wilson, 2006, p.75) which shows how someone must be punished for the act of burning down the mill. A judgement is passed claiming that "they know who done it" and an action is immediately taken "They won't let anybody cross the river down in Scotch Bottom" (Wilson, 2006, p.75). By physically banning coloured people from leaving, slavery is resurrected

in a new form. Many African Americans were killed while trying to flee to the North in hope of finding a better life with humane conditions. The act of burning down the mill in the first place is a rebellion against the imposed subordination of Caesar, the authority figure representing the unjust law and Solly the regular man on the street who claims to have burnt it:

Yeah, I burnt it down! The people might get mad but freedom got a high price. You got to pay. No matter what it cost. You got to pay. I didn't mind settling up the difference after the war. But I didn't know they was gonna settle like this. I got older I see where I'm gonna die and everything gonna be the same. I say well at least goddamn it they gonna know I was here! The people gonna know about Solly Two Kings!  
(Wilson, 2006, p. 75)

Black Mary's declaration of what her brother, Caesar, used to be shows how some African Americans have given up their true identity only to adopt a false one because it is more powerful. He chooses the misrepresented image and indulges in its darkness over his natural one weaved by his ancestors. The 'other side' shows the dichotomy in character beliefs and behaviour. That which shows brotherly compassion, love and family solidarity as opposed to cruelty and indifference. She addresses him saying:

I remember you when you was on the other side of the law. That's my brother. The one selling hoecakes off the back of a wagon. The one that helped Mrs. Robinson and the kids when nobody else would. That's my brother. The one who used to get out of bed to take me to school. The one who believed everybody had the same right to life ... the same right to whatever there was in life they could find useful. That's my brother. I don't know who you are. But you not my brother. You hear me, Caesar?  
You not my brother. (Wilson, 2006, p.84)

Stunned by his sister's harsh yet true words, Caesar steps down and leaves Aunt Ester's house that has been repeatedly mentioned as a "sanctuary" (Wilson, 2006, p.79) for all seeking a home or a shelter.

Spirituality is Wilson's fundamental theme in the play. He is successfully able to construct around it a world in which the African American can shelter himself from all the cruel injustices he is living through. By spiritually reconnecting with the past, with heritage and true identity, the present can be endured and the future rewritten. Solly's stick, the symbol of the painful past is in the hands of the



African Americans. This source of accomplishment, of control brings pride and a sense of fulfilment. The positive note which ends the play signals the continuity of life, the passing of the experience from the old generation to the youth, of the movement, of the stick from Solly to Citizen, symbolises the continuity of the journey with the same strong belief, persistence and zeal of that of his predecessor.

The physical locations represented by; Aunt Ester's house, the City of Bones, the Gem of the Ocean boat, Alabama and the South all stand as stories and experiences of African American proof of survival. The closing words: "So live" (Wilson, 2006, p.85) uttered in the play pass on the mission of living from one generation to the next. From Solly to Citizen who resumes the former's mission in life. Solly's physical death signals a rebirth of Citizen's life and a new start. The play ends with 'live', which shows the survival of Solly's spirit through others in spite of the physical death of his body which will join his ancestors in the city of bones. Wilson here shows how freedom can be achieved through transcending bodily existence with all its imposed limitations and earthly boundaries. Solly's spirit is free to soar into a realm governed and protected by God and no human has power to control or prohibit. True freedom is achieved as Solly joins those who have passed to the Almighty's sanctuary.

Wilson successfully presents a reconstructed image of the African American identity based on centralizing him and sending him back to his original African heritage, land and spirit. Aunt Ester's consistent desire to go back to the past shows how this is the only way to save people's souls from getting lost. Both journeys: physical and spiritual, in the play revisit the past to correct the wrongs and create a satisfying present and future. The characters are supported and helped by those around them to achieve their goals. The idea of a strong and unified community where its subjects depend, rely on and support one another comes at the core of solidarity. He shows how community comes first in importance and how each 'Citizen' must comply to carry the mission and that in its turn empowers the whole body of the African American people. No one will get far on his own, Citizen needs the help of Aunt Ester, the support of Elli, Black Mary and Solly to cross over and reach the 'City of bones' to get reconnected with his lost but not forgotten past. Support of the community, through the old folkloric song performed together as a mood settler and guide on the play within the play scene shows how Citizen needs the past to survive his present and live his future.

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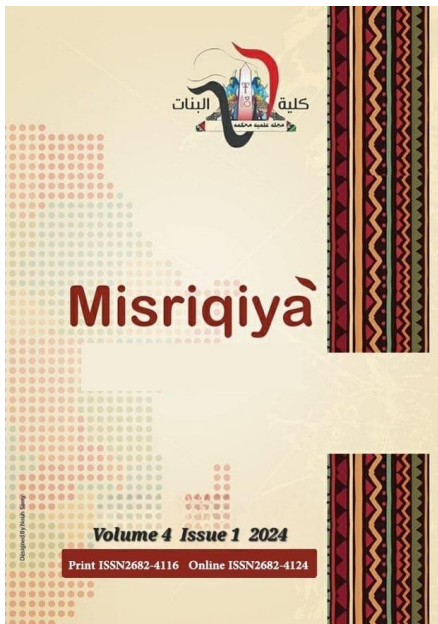
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## Social Identities and Social Conflict Eruption in Chimamanda Ngozi Adichie's *Half of a Yellow Sun*

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### Abstract

Over the past decades, the nature of war has transformed from inter-state wars to intra-state conflicts. By the end of colonialism, many African countries, including Nigeria, were plagued by violent uprisings and civil wars. Among the literary works that tackle the preconditions of the Nigerian Civil War is Chimamanda Ngozi Adichie's *Half of a Yellow Sun* (2006). Although the novel has been extensively analyzed, the correlation between social identities and conflict eruption almost remains absent. Adopting an interdisciplinary approach, this paper delves into Henri Tajfel's Social Identity Theory and John Turner's Self-Categorization Theory, social psychological theories that examine the interplay of social identity, group identification and social categorization in conflict eruption. The paper aims to show the significant role that social identity, when taken to the extreme, plays in triggering conflict, highlighting the impact of British colonialism in intensifying group identities in Nigeria as presented in Adichie's *Half of a Yellow Sun*. Moreover, it sheds light on the terrible consequences of conflict escalation.

**Keywords:** *civil war; social identity; social categorization; colonialism; Half of a Yellow Sun.*

## **Social Identities and Social Conflict Eruption in Chimamanda Ngozi Adichie's *Half of a Yellow Sun***

### **Introduction**

*Half of a Yellow Sun*, set against the backdrop of the Biafran War (1967-1970), is one of Adichie's most praised novels. It won several awards, the top of which is the Orange Prize for fiction in 2007; it was also shortlisted for other awards including, "the 2007 Commonwealth Writer's Prize". It has gained much popularity, especially after its adaptation into a film in 2013 (Coffey, 2014). Since today's Nigerian population is mainly comprised of youths, as nearly half of the population are teenagers under fifteen years old, Adichie revisited the history of the Nigerian Civil War to educate Nigerians who did not witness the war of that period of history when the country was divided politically and culturally (Hawley, 2008). Though she did not witness the civil war herself as she was born years after the war, the trauma of the war has been transmitted to her through her parents. She declares that "the war is not mere history for me; it is also a memory, for I grow up in the shadow of Biafra" (Adichie, 2008, p.50). The shadow of war keeps haunting her as she lost her grandfathers during the war in addition to the loss of her parents of their assets and belongings. Thus, she feels the urge to reflect on the implications and the repercussions of the Biafran war in her novel.

In *Half of a Yellow Sun*, Adichie gives a vivid objective image that offers multifaceted implications for Nigerian society before and during the Nigerian Civil War. The novel focuses on the correlation between identities and conflict eruption: how group identities can cause intractable conflicts, how group identities can be manipulated, and how British colonialism intensified group identities in Nigeria. Thus, before presenting the theoretical framework and analyzing the novel, a brief historical background of the Nigerian-Biafran war is presented to better understand the formation of group identities in Nigeria.

### **Nigerian Civil War Historical Background**

Before 1914, there was no Nigeria with its present borders. It is a colonial creation that was formed through two stages: firstly, by welding together the Protectorate of Lagos and the Niger Coast Protectorate to be a unified Southern Protectorate in 1906 and secondly by amalgamating the Southern and Northern

Protectorates in 1914. In fact, the amalgamation was designed to facilitate administrative work, avoid conflicts between various colonial governments and cut down expenses (Falola and Heaton, 2008). Hence, the colonial decision of amalgamation did not consider the cultural, ethnic and religious disparities between the North and the South.

The disparities among the communal content of Nigeria were even aggravated by the divide-and-rule colonial policy that introduced “asymmetric developments educationally, politically, socially between the northern and southern regions in order to deepen the already existing differences” (Adedji, 2016, p.324). Moreover, the colonial 1950s constitutions aroused the rivalry between Nigerian ethnic groups as they divided the country into three regional structures: Northern, Western and Eastern entities that were inhabited by over 250 ethnic groups but led by three major dominant groups. The Hausa, Igbo and Yoruba dominated the Northern, Eastern and Western regions respectively (Gabra and Gabra, 2005; Adedji, 2016). At independence, Nigeria adopted a federal system in which representation in the national government was based on the population of each of the three regions. Therefore, political parties fought to maintain control of the national government. Since the North according to the colonial division was the largest region, it “could dominate the veto policies approved by the other regions” (Spalding, 2000, p.54).

Northerners were worried about possible “domination” by the well-educated Southerners; likewise, Southerners feared being dominated by the unskilled Northerners. These fears resulted in “flawed elections and fraud census in 1964 and 1965”. The gloomy atmosphere of corruption and mistrust ended up with a military coup, in January 1966, led by a group of army officers to bring change (Falola and Heaton, 2008, p.159). Several leaders, mostly Northerners, were left dead in the coup including Federal Prime Minister Tafawa Balewa. Meanwhile, General John Aguiyi-Ironsi took control of the government. Attempting to eradicate regionalism, Ironsi dismantled the federal system creating a unitary government. While the Southerners welcomed Ironsi’s measures, the Northerners viewed the coup and Ironsi’s policy as an Igbo conspiracy designed to dominate the North. What raised the Northerners’ doubts were several matters at the top of which was the ethnic nature of those who led the coup and those who were killed during the coup: four out of the five majors who led the coup were Igbo and most of the political leaders that were killed were Northerners. Consequently, in July 1966, a bloody counter-coup led by Northern officers occurred whereupon

General Ironsi was killed and Lieutenant Yakubu Gowon took control of the government (Falola and Heaton, 2008). Thus, Nigeria was driven into a protracted conflict that lasted for almost three years.

Perceived as threats, Igbos were attacked, and riots broke out targeting Igbo residents in the North leaving almost 80,000 dead. Such a massacre led Okjukwu, the Igbo military governor of the Eastern region, to announce the secession of the Eastern region calling it the independent Republic of Biafra in 1967 (Falola and Heaton, 2008). In response, Gowon, the head of the Federal Military Government, did not recognize the new Republic, and, in July 1967, a bloody war was launched against Biafra to get it back. What made the matter worse was the blockade imposed on Biafra during the war, a matter that led to a severe shortage of food and supplies. After three years of war, Biafra surrendered and the war ended in January 1970 leaving from one to two million dead mostly from starvation (Aremu and Buhari, 2017). In fact, the role that social identity plays in war eruption and escalation is significant, so it would be illuminating to study the dynamics of social identities and how they can alter individuals' perceptions.

### **Social Identity Theory and The Dynamic of Inter–Group Relations**

Social identity theory (SIT) was first pioneered by Henri Tajfel and then further developed by John Turner, in the 1970s and the 1980s, to examine “the group in the individual” and hence inter–group behaviour (Hogg and Abrams, 1998, p.3). SIT refers to the way individuals define themselves in terms of a certain social group. According to Henri Tajfel, social identity is defined as “that part of the individuals' self-concept which derives from their knowledge of their membership of a social group (or groups) together with the value and emotional significance of that membership" (1982, p.24). Hence, social identity theory revolves around the correlation between group membership and self-enhancement.

For Tajfel, social identity is the result of the process of social categorization, social comparison and the motivation of self-enhancement. He shows that people categorize themselves into groups to better understand their surroundings; people categorize others in terms of nationality, religion, race, color, gender, club membership, university unions and so on. People can belong to more than one category at the same time; however, when group membership is prioritized, i.e., becomes more salient than others, group behaviour is initiated because an

emotional significance is added to this particular group membership. The next mental process that appears immediately after categorization and social identification is social comparison. Hence, people start to evaluate their group by comparing it to another relevant group (1982). For example, if the Blacks are to evaluate the social standing of their group, they compare their status against that of the Whites, not against males or Christians. The end result of social comparison determines the individual's positive or negative social identity and hence his self-esteem.

One of the major contributions of the theory is the 'minimal group paradigm', a series of experiments through which Tajfel proves the correlation of social categorization and inter-group behaviour that could trigger out-group discrimination. In his minimal group experiment, Tajfel divides a number of students with no prior interaction or conflict into groups. Surprisingly, in-group favouritism and out-group discrimination are easily triggered by their interaction (Turner et al, 1987). The mere awareness of the division into "we" and "them" is enough to "provoke intergroup competitive or discriminatory response" (Tajfel and Turner, 1986, p.279). It is worth mentioning that in-group bias is not based on objective measurements; it is rather subjective and sometimes "unjustifiable" (Turner et al, 1979, p.187). Hence, group members constantly seek to achieve positive inter-group distinctiveness, to feel that their group is positively distinctive in comparison to out-groups. The main motivation behind seeking positive distinctiveness is to enhance the self-esteem motive because identifications to social categories become part of the self-concept and the definition of self.

While SIT focuses mainly on intergroup relations, John Turner develops SIT and presents his theory of self-categorization to focus on intragroup relations. Turner postulates that the process of categorization is the cognitive base of group behaviour. The core concept of his theory is the process of *depersonalization*, "the process of 'self-stereotyping' whereby people come to perceive themselves more as the interchangeable exemplars of a social category than as unique personalities defined by their individual difference from others" (Turner et al, 1987, p.50). It is this transformation of self-perception that produces the group phenomena. Eventually, the group member internalizes his group "prototype": the attitudes and the characteristics that differentiate a group from another (Hogg and Terry,



2000). Such internalization of the in-group prototype entails that a person may behave as an individual in a way that is different from the way he/she behaves as a group member. Depersonalization is the process that opens the door to group solidarity and group polarization. It should be noted that social identities are inevitable and beneficial as they shape individuals' sense of self, provide them with a sense of belonging and foster social cohesion. However, when social identities are taken to the extreme, inter-group tensions may erupt. Therefore, social identities are often manipulated, whether by internal or external factors, to serve some political ends. Thus, the dynamics of social identity construction offered by the theories of both Tajfel and Turner are illuminating tools that help better understand the war narrative trope presented in Adichie's *Half of Yellow Sun*.

### **Social Identities and The Eruption of Conflict in *Half of a Yellow Sun***

*Half of a Yellow Sun* is a war narrative that traces the life of Ozobia's extended family: his twin daughters Olanna and Kainene, and their partners Odenigbo and Richard respectively. The novel follows the epistemological journey of Ugwu, Odenigbo's houseboy who transforms from a village boy to a teacher and then an author. The novel weaves the pre-war life of individuals with the political course of events by its division into four parts alternating between the early sixties—that portray the love affair of both Olanna and Kainene and their partners, the betrayals that happened in their relations, Ugwu's naivety and the academic circle held in Odenigbo's house—and the late sixties that present the political turmoil leading to the Nigerian-Biafran War. Throughout the novel, the disharmonious nature of Nigeria's ethnic groups—Hausa, Igbo and Yoruba—is highlighted. Nancy Spalding (2000) reveals that in the wake of independence, the Muslim Hausa remained insulated from the cultural influence of colonialism; they were not exposed to British missionaries or to Western education in return for their loyalty to the British rule. They value order and hierarchy and are keen on keeping social integrity. On the contrary, the Igbo were well-educated and exposed to the modern Western lifestyle. Unlike the conservative nature of the Hausa, the Igbo were dynamic, rebellious and individualistic. As for the Yoruba, though well-educated as the Igbo, they seek a way between the "individualism" of the Igbo and the

“hierarchy” of the Hausa (p.71). Thus, such a different communal content is a fertile ground for conflict eruption

From the very beginning of the novel, the reader is introduced to the different ethnic communal content of Nigeria. On her visit to Uncle Mbaezi in Kano in the North, Olanna meets her uncle’s Hausa friend, Abdulmalik, who sells leather slippers. The dichotomy between the educated South and the uneducated North is evident when Abdulmalik is highly impressed by Olanna’s success in gaining her master’s degree from London; “he had that expression of people who marvelled at education with certainty that it would never be theirs” (Adichie 2006, p.50). The novel, also, gives a glimpse of the different outfits of the Hausa and Igbo people. When Olanna visits her Hausa ex-lover, Mohammed, he is in “a white caftan” and his mother is wearing “silk scarves around her head” (p.57). The traditional outfit of Mohammed is juxtaposed with the modern style of Olanna’s Igbo partner, Odenigbo, who is portrayed at the very beginning of the novel as wearing “a print shirt and a pair of trousers” while heading to a club to play tennis (p.7).

Adichie is keen on showing the saliency of social identity and its subsequent inter-group behaviour in the Nigerian society. The gap between each group is subtly highlighted through the reference to the impossibility of inter-group marriage. This is apparent when Arize, Olanna’s cousin, redeems Olanna’s separation from the handsome Mohammed telling Olanna, “if only Mohammed was an Igbo man, I would eat my hair if you did marry him” (p.52). When Olanna, mockingly, shows that she can help her to get married to one of Mohammed’s friends, Arize’s reply reveals how such an offer is not an option, “papa will kill me first of all if he knows I was ever looking at Hausa man like that” (p.52). Such a conversation denotes the existence of group polarization, culminating in discriminatory responses.

Hence, the novel reiterates that the inherent cultural difference between Nigeria’s ethnic groups is even intensified by the divide-and-rule policy of colonialism. The link between the colonial rule and the antagonism brought up between different ethnic groups is captured through Richard’s article in which he comments on the massacre of the Igbo in the North saying:

If this is hatred, then it is very young. It has been caused, simply, by the informal divide-and-rule policy of the British colonial exercise. These policies manipulated the differences between the tribes and

ensured that unity would not exist, thereby making the easy governance of such a large country. (Adichie, 2006, p.209)

The above quotation negates the Western single story of the violence in Nigeria that depicts Africans as uncivilized barbaric creatures who are prone to violence by nature. Rather, the novel presents the other part of the story by “connecting the violence in post-independence Nigeria with the centuries of colonial rule” (Novak, 2008). Hence, the novel not only refutes the Western perspective of Africans as inherently violent but highlights the role that colonialism played in forming group identities in Nigeria.

Group identities are, thus, polarized due to the British tendency to favour the Northerners bestowing them access to political power, a matter that threatens other group identities. This idea is revealed, in the novel, in the subtext, “The World Was Silent When We Died” which shows in its second extract that the British may favour Northerners because they are “perfect for indirect rule” (Adichie, 2006, p.146). Moreover, the ethnic imbalanced colonial structure is highlighted when Colonel Madu, an Igbo army officer, comments on the violent nature of the counter-coup telling Kainene the following:

The problem was the ethnic balance policy. I was part of the commission that told our GOC that we should scrap it, that it was polarizing that army, that they should stop promoting Northerners who were not qualified. But our GOC said no, our *British* GOC. (p.178)

The imbalance of ethnic structure in Nigeria is aggravated especially after the Northerners’ dominance of the central government according to the colonial constitution. Adichie portrays the fragile status of Nigeria at independence through *The Book* as follows:

To propitiate the North, [The British] fixed the pre-independence elections in favour of the North and wrote a new constitution that gave the North control of the central government ... At independence in 1960, Nigeria was a collection of fragments held in a fragile clasp. (p.195)

Such a gloomy atmosphere invokes mistrust and misconceptions among different ethnic groups as each group feels threatened by the other. Thus, these feelings of mistrust and fear are reflected through Olanna’s coincident meeting

with a Hausa Man on the plane heading to Lagos. In the beginning, the man admires Olanna treating her with decency and gentleness. Mistakenly thinking her a Hausa woman, he offers her *The New Nigeria Magazine* which deals with anti-Igbo news. During the conversation, the man reveals his worries from the Igbo, “the problem with Igbo people is that they want to control everything in this country. Everything. Why can’t they stay in their East?” (pp.283-4). Surprisingly, the man is stunned when he knows that the beautiful gentle Olanna is Igbo, so he immediately cuts his conversation with her and remains silent. Indeed, the man’s prejudice against Igbo reflects the widespread hatred and fear at that period of time. His prejudice leads him to treat Igbo individuals as exemplars of their social group. His gentle attitude towards Olanna at the beginning is turned upside down when treating her according to her social identity. Moreover, the anti-Igbo sentiment is also evoked early in the novel when Olanna knows on her first visit to Kano that Northerners segregate Igbo and Hausa children in schools. Despite the Igbo’s attempt to dissuade the Northerners from applying the policy of school segregation, the Northerners refuse to let their children mingle with Igbo children.

One of the preconditions of social conflict is the weak state that leaves a space for corruption and unfair distribution of resources among its communal groups (Azar, 1990). In fact, any unfair distribution of sources accentuates social comparison, thereby triggering in-group favouritism and out-group discrimination. Therefore, Adichie is keen on disclosing the acts of corrupt politicians and elites in post-independence Nigeria to shed light on the factors that intensified group identities. Through the character of Olanna’s father, chief Ozobia, Adichie presents the corrupt elites. He is a materialistic illiterate person who is known for his malpractices in business for the sake of gaining more money and assets. The reader realizes the degree of his corruption when Suzan, a British expatriate, tells Richard that, “Chief Ozobia owns half of Lagos...He doesn’t have much of a formal education, you see, and neither was his wife” (p.74). However, Ozobia could not have been corrupted alone; he needs the assistance of corrupt politicians as well. This is evident in the dinner Ozobia arranges with Okonji, the minister of finance. Throughout the dinner, Okonji keeps flirting with Olanna despite her hatred of him. What made the matter worse is the hidden agreement between Okonji and Ozobia according to which the former facilitates a building contract with the latter in exchange for an affair with Olanna. Indeed, such kind of agreement shows the meanness and the corruption of both politicians and elites. In his “Corruption in Post-Independence Politics: *Half of a Yellow Sun* as a

Reflection of *A Man of the People*” (2017), Chikwendu Paschalkizito Anyanwu notices how Adichie’s physical depiction of Okonji as a man who “salivates when he smiles” reflects his sordid actions and suggests “an unpolished fellow” (p.143).

Ironically enough is Mrs. Ozobia’s attitude towards her servant when he steals a small amount of rice. She is enraged and about to fire him, but Olanna interferes and gives him another chance. Speaking to Odenigbo about the incidents, Olanna links the servant’s act of stealing with her father’s corruption:

My father and his politician friends steal money with their contracts, but nobody makes them kneel to beg for forgiveness. And they build houses with their stolen money and rent them out to people like this man and charge inflated rents that make it impossible to buy food. (Adichie, 2006, p.276)

The above quotation alludes to the corruption prevalent in Nigeria at the time and to the disparities of resource distribution among different groups.

### **The Dynamics of Conflict Escalation**

All the above-mentioned premises, that sharpen group identities, lead to the eruption of a protracted conflict and a long-term cycle of violence. Since personal and group identities are threatened, self-categorization becomes salient as the individuals’ sense of belonging to his/her group has been a priority. The division into “we” and “they” is enough to trigger in-group favouritism and out-group discrimination (Tajfel and Turner, 1986, p.279). Indeed, Adichie is keen on portraying the dynamics of conflict escalation and its socio-political implications. Riots have erupted in the North targeting the Igbo after the coup and counter-coup. Olanna witnesses the massacre in the North on her second visit to her Uncle. She sees the campaign launched against the Igbo as the Hausa men are shouting, “The Igbo must go. The infidels must go.” (p.85) The word “the infidels” shows how they devalue the out-group, the Igbo, thereby delegitimizing them of any human right and excluding them from “acceptability” (Bar-Tal, 1990, p.65). Amid this chaos, Olanna hurries to rescue her family from the ongoing bloodbath, but upon her arrival at her Uncle’s house, she finds her aunt, uncle and cousin slaughtered at the hands of their Hausa neighbours:

She stopped when she saw the bodies. Uncle Mbaezi lay facedown...Something creamy-white oozed through the large gash on the back of his head. Auntie Ifeka lay on the veranda. The cuts on

her naked body were smaller, dotting her arms and legs like slightly parted red lips. (Adichie, 2006, p.186)

Surprisingly, the one who brutally murders Olanna's relatives is Abdulmalik, Uncle Mbaezi's old friend. What turns their friendship into animosity is the process of delegitimizing the other which leads to dehumanization. Therefore, it is noticed, throughout the novel, that each group describes the other as transgressors; for instance, the Hausa calls the Igbo "the rebels" and the Igbo calls the Hausa "the vandals". To keep the cycle of violence running, each group has to constantly give a rationalization of violence (Bar-Tal et al, 2012). Thus, it is seen that Abdulmalik justifies his murder of his friend's family by claiming that he meets Allah's will, "we finished the whole family. It was Allah's will" (Adichie, 2006, p.186). His act of justifying violence is considered, indeed, as an intra-psychic coping strategy (Breakwell, 1986). Being unable to assimilate and accommodate the act of violence into his identity structure, Abdulmalik changes the criteria of evaluating violence by giving it a positive value to be able to assimilate the new element into his identity.

A transformation in Abdulmalik's self-perception has occurred as he does not behave with Uncle Mbaezi on an individual level as he used to do. Instead, he perceives himself and Uncle Mbaezi as just exemplars of two different groups in a conflict. This transformation of self-concept is called *depersonalization*, "the process of 'self-stereotyping' whereby people come to perceive themselves more as interchangeable exemplars of a social category than as unique personalities defined by their individual difference from others" (Turner et al 1987, p.50). Adichie draws the reader's attention to the seriousness of perceiving the other only as an exemplar or prototype of a particular group, thereby failing to see the individual as a human being. It is this shift in perception that causes dehumanization and hence genocides. Many innocent civilians lose their lives just for their extreme adherence to a certain group. On the train Olanna takes to escape from Kano, she is exposed to a terrifying scene, a head of a murdered little girl in a calabash. Carrying her daughter's head in the calabash, the woman furiously invites the passengers to take a look at her daughter's head. Shockingly, Olanna "saw the little girl's head with the ashy-gray skin and the braided hair and rolled-back eyes and open mouth" (Adichie, 2006, p.188). The woman challenges the political dimension of the conflict by referring to a very minute domestic aspect regarding the hair of her daughter as she says, "Do you know it took me so long to plait this hair? She had such thick hair" (p.188). The Juxtaposition of the violent

murder of the innocent girl with the domestic suffering of braiding the girl's hair counteracts any rationalization of blind violence. In *The Post Colonial Historical Novel: Realism, Allegory and the Representation of the Contested Past*, Hamish Dalley (2004) sees that the woman's decision to keep a physical piece of her daughter's body "defies the murderers' attempt to reduce her daughter to a sociopolitical category (Igbo, infidel)" (p.132). In the end, civilians are those who pay the price of the war in spite of the fact that they pay no attention to politics as they are only concerned with their domestic sphere.

Since the Igbo soldiers and civilians are dehumanized and seen only as exemplars of a threatening group, desensitization of violence is licensed. Upon the counter-coup led by the Northerners, Igbo soldiers are targeted and many of them are slaughtered. Kainene depicts the dehumanizing murder of one of the Igbo colonels to Richard saying, "Northern soldiers put him in a cell in the barracks and feed him his own shit...Then they beat him senselessly and tied him to an iron cross and threw him back in his cell. He died tied to an iron cross" (Adichie 2006, p.174). The desensitization of violence is also highlighted when one of the Igbo men who has managed to escape from the massacre says to Odenigbo and Olanna, "they are killing us like ants. Did you hear what I said? Ants" (p.181). The man's stress on the word "ants" shows how the Hausa dehumanize and de-abstract the Igbo; they no longer perceive the Igbo as individuals who have human traits.

Indeed, the process of delegitimization and dehumanization is not one-sided; likewise, the Igbo dehumanize the Hausa and perceive the Hausa individuals as exemplars of their social group. Upon the occurrence of the first military coup, Odenigbo and his friends discuss the killing of Northerners' politicians with a sense of amusement. They herald the murders of the Sardauna, the Premier of Northern Nigeria, and the finance minister justifying their attitude by linking the end of corruption to their murder. Their amusement is captured in the following conversation:

There was excitement in their voice even when they talked about the people who were killed.

"They said the Sardauna hid behind his wives."

"They said the finance minister shit in his trousers before they shot him"

Some guests chuckled and so did Ugwu. (Adichie, 2006, p.158)

The humanity of the Sardauna and the finance minister is overlooked; they are just seen as prototypes of the category of corrupt politicians. Therefore, they feel no sympathy for their murder; instead, they are glad for their pain and humiliation. To stop feeling guilty for showing no sympathy for their death, Ugwu justifies his happiness by saying, “but politicians were not like normal people, they were *politicians*” (Adichie, 2006, p.160). His stress on the word “politicians” suggests that typification prevents human sympathy. Likewise, the same excitement is seen when Aunt Ifeka tells Olanna about the murder of the Sardauna. She laughs at his humiliation, sarcastically telling Olanna the following:

They say the Sardauna sounded like that when he was begging them not to kill him. When the soldiers fired a mortar into his house, he crouched behind his wives and bleated, ‘*Mmee-mmee-mmee*, please don’t kill me, *mmee-mmee-mmee*’. (Adichie, 2006, p.164)

However, since Adichie is against the practice of dehumanizing the other by any means, she presents a balanced view through Olanna’s attitude towards violence. Countering the excitement of Aunt Ifeka regarding the murder of the Sardauna, Olanna rejects the humiliating way of his murder by saying, “they should not have killed him...they should have put him in prison” (Adichie, 2006, p.164). Thus, she offers a more humane alternative that does not deny punishment or revenge but denies the dehumanizing way of revenge. Similarly, Olanna opposes the amusement of Odenigbo and his friends towards the murder of the finance minister by speaking about him not on the political abstract level but on the individual level, “I know Okonji. He was a friend of my father’s. She sounded subdued” (p.158). It is only because Olanna still perceives him on the individual level that she could show sympathy for his murder, while the others fail to do so because they treat him only as a reflection of his political affiliation.

Since Adichie resists blind judgements and acute categorization, she does not present the single story of the out-group members. Thus, she presents the positive examples of the Hausa people who manage to humanize the other even at times of conflict so that she would not fall into the trap of depicting all the Hausa men as devils. In the novel, the reader sees an objective representation of the violent scenes. Although Olanna’s relatives are massacred at the hands of Hausa men, it is Mohammed, Olanna’s Muslim friend, who rescued her life. Amid the chaos in the North, Mohammed brings Olanna a long scarf to hide her identity as an Igbo



woman to protect her from any potential harm. He is also the one who drives her to the train station and does not leave her until he is sure that she is safe. Opposing Abdulmalik's rationalization of the murder of Olanna's relatives, Mohammed asserts the false claim of Abdulmalik by telling Olanna:

Allah does not allow this. He was shaking; his entire body was shaking. Allah will not forgive them. Allah will not forgive the people who have made them do this. Allah will *never* forgive this. (Adichie, 2006, p.187)

Mohammed's quotation is a call for reviving moderation and elevating humanity to counter violence and chaos. His 'humanity' transcends the political identity of his group; he denies any rationalization in the name of the God he believes in for inflicting harm on innocent people. His repetition of phrases stresses his refusal of violent mass killing. The murder of disarmed civilians cannot be viewed except as a crime from Mohammed's point of view.

Similarly, the one who saves Colonel Madu's life, Kainene's friend, is a Hausa man. When Kainene and Richard are surprised that Madu is still alive because there were rumours that Madu was killed with other Igbo soldiers, Madu gives the credit for his safety to his friend Ibrahim, "Ibrahim saved my life. He told me about the coup that morning" (Adichie, 2006, p.176). Not only does Ibrahim notify him of the coup, but also he hides Madu in his cousin's house, gives him caftans to disguise and gives him money to escape. Thus, both Mohammed and Ibrahim are ideal examples intentionally drawn by Adichie of human beings who retains a balanced view that enables them to make sound judgements in spite of group identity. Such attitude is what Adichie aims at spreading to prevent potential upcoming genocide.

Adichie is keen on showing the multi-dimensional sphere of the repercussions of violence. Not only does the curse of violence plague victims and insiders, but it also extends to plague victimizers and outsiders. Violence begets violence and once it erupts, its catastrophic impact cannot be controlled. Olanna, representing the insider victim of war, is plagued by war atrocities. Unable to assimilate the violence she has witnessed in Kano, Olanna suffers from physical and psychological symptoms of trauma. Upon her arrival at Odenigbo's house, Olanna suffers from "dark swoops" and her legs are paralyzed. When she later restored her ability to move, she could not escape the haunting memories of her massacred relatives. When Odenigbo hugs her when he sees her walking, "she thought about

Arize's pregnant belly, how easily it must have broken, skin stretched that taut. She started to cry" (Adichie, 2006, p.201). The past creeps to intrude into her present and it is recalled through small triggers. Amidst Olanna, Odenigbo and Ugwu's celebration of the secession announcement and the birth of Biafra, Olanna's memories spoil her happiness as she remembers Auntie Ifeka's corpus:

Odenigbo raised his arms as he spoke, and Olanna thought how awkwardly twisted Auntie Ifeka's arm had looked, as she lay on the ground, how the blood had pooled so thick that it looked like glue, not red but close to black...Olanna shook her head, to shake away the thoughts. (Adichie, 2006, p.205).

Even at the end of the novel, the memory of the plaited hair of the little girl's head in the calabash is recalled when she combs Baby's hair. She puts the comb down and tells Ugwu about the little girl's head, her open eyes and her hairstyle. The thematic repetition of trauma symptoms is reflected on the structural level of writing the novel through the incorporation of the fragmented extracts of the Book, "The World was Silent When We Died" since it repeats the story of the head in the calabash and stresses political affairs that are mentioned in the storytelling of the novel. In this respect, Senayon Olaoluwa states:

As a text-within-a-text, it underscores the agency of repetition in foregrounding the suffering of the Igbo in *The Half of a Yellow Sun*.... Such repetitions in the end validate the assumption that gaining access to extreme experiences of traumas instigated by violent histories can be facilitated through the repetition of suffering. (Adichie, 2006, p.25)

The threads of violence, also, entangle victimizers into the fabric of trauma. In the novel, Ugwu is turned into a victimizer when he participates in the rape of the bar girl after he is enforced to be a Biafran child soldier. Finishing one of the war operations, Ugwu and his child soldier colleagues enter a bar to have a drink. When the bar girl tells them that there is no drink available in the bar, they rape the girl one after the other. At first, Ugwu refuses to participate, but when his masculine identity is threatened by his colleague's remark, "aren't you a man", he takes part in the rape (Adichie, 2006, p.458). At this moment, he is depersonalized into the attributes of his group. However, there is a conflict between his new act and his previous components of identity. He could modify neither the process of assimilation/accommodation nor the process of evaluation

as he cannot find justification for his act. Therefore, he could not cope with his threatening position, and he is plagued by his violent act. Being traumatized, he could not escape the memory of the girl's disgusting look as it kept haunting him. In his dreams and daydreams, he relives his traumatic experience again and again until he "woke up hating the image and hating himself" (Adichie, 2006, p.497). Hence, the reader is taken into the minds of the victimizer "to show how the perpetrators themselves are victims of oppression and their own violence" (Ngwira, 2012).

No longer are the insiders the only sufferers of social conflicts; the outsiders are also plagued by the ongoing violence. Richard, representing the outside west, does not remain safe during the conflict. In the airport in Kano, Richard meets a young Igbo customer service agent called Nnaemeka with whom he talks for a short while. Suddenly, their conversation is cut when Northern soldiers start shouting at the people at the airport, "where are the Igbo people? Who is Igbo here? Where are the infidels?" (Adichie, 2006, p.192). Identified as Igbo, Nnaemeka is shot in front of Richard's eyes. He could not grasp the horrifying sudden scene that he had witnessed. His suffering is revealed through his focalization, "there was a painful ringing in his ears...he stood aside, vomiting" (p.193). Moreover, he is haunted by the image of Nnaemeka's murder to the extent that he wishes that what he has seen did not happen and that it is just an image out of his imagination. However, being sure that it has really happened, "he began to cry" (p.195). Hence, Richard's psychological agony is significant as it shows that the range of the repercussions of violence is unlimited and uncontrollable. It is not confined to a local sphere; rather, it can reach the outside community as well. Once an inter-state conflict erupts, other ramifications come to the surface like the issue of refugees who perceive the outside community as the only resort while the outside community perceives their presence as a heavy burden. Thus, foreign countries, though geopolitically far from the conflict, are affected by the countries' inter-state conflicts in one way or another. Thus, violence is a burning hell that does not distinguish one from another.

## Conclusion

Highlighting the intersection of public and private spheres, the novel sheds light on the correlation between social identities and conflict eruption. While social identities play a significant role in providing individuals with a sense of belonging and fostering social cohesion and cooperation among group members,

extreme adherence to rigid social identities that dehumanize members of the out-group can lead to undesirable outcomes, including violence. The cognitive process entailed in the formation of social identity that postulates the derivation of one's self-esteem from his/her group membership can alter the individual perception, thereby acquiring the attributes of his/her group. Once the individual turns to be only an exemplar of his/her group, group polarization comes to the surface and violence can erupt. Thus, the novel shows how group polarization, in Nigeria, resulting from the disharmonious ethnic formation and the long history of colonial rule, has played a vital role in conflict eruption and escalation. Throughout the course of the novel, the reader witnesses that the curse of violence is inescapable; once it erupts, its plague extends to include victims and victimizers, insiders and outsiders. Hence, it's indispensable to highlight the importance of the agency of individuals and the role it plays in mitigating the negative consequences of extreme adherence to social identities and balancing between group identity and human values. Thus, the novel underscores the importance of having a balanced view towards the out-group and avoiding blind social categorization to have cohesive communities able to withstand outside pressures that can lead to violence.

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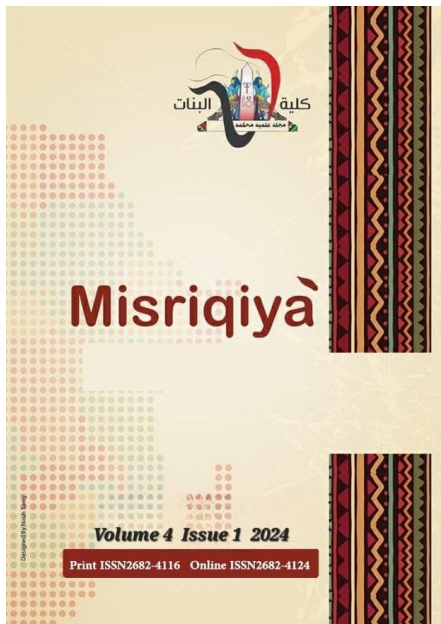
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## Anecdote of the Enfant Terrible: The Stigma of Madness in the Works of Dambudzo Marechera

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### Abstract

Madness has always been a recurring theme in many literary works. Consequently, there was a growing critical interest in studying the representations of madness in literature. Later, the theme of madness gained a new level of interpretation since it has become a pretext for violations committed by authorities. It was used as a tool to restrict many non-conformist writers by censoring or banning their literary productions, in addition to different forms of torture to silence their voices. This paper addresses the question of madness in the legacy of the enfant terrible, the Zimbabwean poet, novelist, and sociopolitical critic Dambudzo Marechera (1952- 1987), in the light of Michel Foucault's interpretation of madness and power. Since some of Marechera's writings present the correlation between madness and power, the Foucauldian paradigm presents a valid theoretical explanation for his works. Marechera faced sociopolitical turbulence in colonial and postcolonial Zimbabwe at his time; he also experienced many problems during his scholarship in England which all eventually contributed to his suffering from psychological and mental crisis. Insights from Foucault can explain how the literary trajectory of Marechera was affected by the authority's definition of madness and its practice of power. Marechera has been stigmatized as mad, yet he tried to challenge such stigma as reflected in *The House of Hunger* (1978), *Mindblast* (1984), and *Cemetery of Mind* (1992).

**Keywords:** *Dambudzo Marechera, Michel Foucault, power, madness, stigma, madness in Africa, The House of Hunger, Mindblast, Cemetery of Mind.*



## Anecdote of the Infant Terrible:

### The Stigma of Madness in the Works of Dambudzo Marechera

I cannot rest from travel: I will drink  
 Life to the lees: All times I have enjoy'd  
 Greatly, have suffer'd greatly, both with those  
 That loved me, and alone, on shore, and when  
 Thro' scudding drifts the rainy Hyades  
 Vext the dim sea: I am become a name;  
 For always roaming with a hungry heart (Tennyson, *Ulysses*)

### Introduction

Madness is always regarded as a remarkable phenomenon to study even before the progression of modern psychiatry which is now practiced in clinics and hospitals. *Key Concepts in Mental Health* (2017) defines madness as “unintelligible conduct and spoken thought. The person inhabits an idiosyncratic world, which does not make immediate sense to others” (p. 178). Historically, most mental disorders were attributed to madness due to its social, cultural, religious, superstitious, physical, or political associations, in addition, of course, to a lack of professional medical knowledge. According to the *Oxford Handbook of Psychiatry* (2013), “the public imagination has been fascinated ... by the mentally afflicted. ...[and] the social and political responses to mental illness and the mechanisms that have emerged to ... control the ‘mad’ among us” (p. 18). Thus, the lack of professional knowledge before the twentieth century and the spread of superstitious beliefs highly controlled the way people approached any mental disorder, especially with the absence of serious scientific attempts to understand their nature.

With the advancement of Western psychiatry in the 20th century, the Austrian neurologist, and the founder of psychoanalysis Sigmund Freud (1856-1939) provided preliminary explanations of the unconscious that explained many mental disorders, including *madness*. Freud's theories paved the way for more research, leading to a revolutionary interpretation of madness within cultural, political, and historical contexts. This interpretation was the result of a study conducted by the French philosopher and critic Michel Foucault (1926-1984) in his book *Madness and Civilization* (1961) which was a critical

documentation of the history of madness and the evolution of psychiatry and how power manipulated this field to guarantee its supremacy. Foucault critically examined the historical and sociological conceptions of madness, altering the traditional portrayal of power, knowledge, and social and political notions. This subverted popular narratives about mental health and helped to dismantle the cruel attitude towards mentally disturbed patients across history.

Madness was not only limited to having physical aggression, hostility towards people, emotional and mental disturbance, or an illogical way of thinking but it was also related to openly expressing unwanted or questionable opinions or views. This was primarily due to insufficient medical studies and the wish for authority to manipulate this rising field to ensure its sovereignty. Articulating unorthodox ideas may be a daring challenge to the canonical or mainstream views imposed on societies. Expression of dissent is therefore defined as “madness”, which may lead to chaos, according to the guardians of the canon represented by authority.

Literature, serving as a platform for unrestricted expression, has been utilized by intellectuals to exercise autonomy and confront injustice. However, this has led to the labelling of their literary output as madness rather than a manifestation of anger or a form of resistance. Influenced by Foucault's insights, critical analyses have transformed the portrayal of power, madness, and other societal and political concepts. This connection between madness and power is evident in the works of Zimbabwean novelist, poet, and sociopolitical critic Dambudzo Marechera (1952-1987). Marechera's life and literary creations exemplify how the manipulation of psychiatry by authorities negatively impacted his journey and writings. The Foucauldian framework provides a plausible theoretical explanation for many of Marechera's works, illustrating the link between power and madness. Marechera's experiences during the sociopolitical upheaval in Zimbabwe, both during and after the colonial era, coupled with challenging circumstances in his academic pursuits in England and subsequent detention upon his return to Zimbabwe, significantly contributed to his psychological struggles. His literary expressions were profoundly influenced by both his life experiences and the policies enforced by colonial and national authorities. As such, the selection of this theoretical framework for interpreting Marechera's texts is motivated by the need to delve into the interplay of madness, authority, and literary resistance. Marechera's accusation of madness was

magnified and manipulated to undermine his credibility and raise doubts about the authenticity of his literary works, particularly following his diagnosis of schizophrenia.

## Research Questions

The research aims to address several key questions centred around the definition of madness as a domain for exercising authority, particularly in the context of the insurgent intellectual Dambudzo Marechera, often labelled as the *enfant terrible of African literature*. The primary research questions include:

How does the definition of madness serve as an arena for practising authority, in the case of Dambudzo Marechera and impact the perception of his literary contributions? What is the connection between the deteriorating sociopolitical conditions and the psychological challenges experienced by Marechera, and how do these factors intersect in influencing his literary choices? To what extent was Marechera's psychological condition, characterized by schizophrenia and hallucinations, manipulated by authorities to undermine the value of his literary output, and compromise his integrity? In what ways did the authorities attempt to stigmatize Marechera's suffering by labelling him as mad, aiming to dehumanize him and diminish his credibility? Can the controversial literary production of *allegedly mad writers*, such as Marechera, be considered an act of resistance and an effort to challenge the stigma imposed by authorities on mentally challenged writers?

## Rationale of the Study

The paper tries to read the legacy of the Zimbabwean poet and novelist Dambudzo Marechera as an example of *an allegedly mad writer* rather than as an angry writer in the light of Foucault's definitions of madness and power to present a coherent reading of his most highly critical literary production. It is an attempt to approach some examples of his literary legacy as an exceptionally challenging method of expression. The main reason for choosing the Foucauldian paradigm to discuss Marechera's works is the need to understand how many examples in his literary trajectory were affected by the authority's manipulation of the definition of madness. This manipulation as a tool was mainly an attempt by the authority to silence his harsh criticism of the authorities in colonial and postcolonial Zimbabwe, especially in the era of Robert Mugabe, the former Zimbabwean prime minister and president. Consequently, this paper will primarily focus on how the

theme of *madness* has always been a recurring allegation for silencing many dissident writers by accusing them of being mad to disgrace them and negatively affect the integrity of their harsh criticism of authority.

### **Madness as an Arena of Power**

To understand how mental health was approached through time, there was a need to track the history of psychiatry. The *Oxford Handbook of Psychiatry* gives historical accounts of the early premises of psychiatric interventions in dealing with mental disorders after years of being “poorly funded, exiled to outside hospitals, a victim of rushed political experiments, castigated by anti-psychiatrists, its intellectual basis ridiculed” (p. 2). As such, psychiatry did not provide a sufficient scientific account in the beginning, but it was just a field full of negative connotations and misconceptions. It was not a reasonable attempt to understand “the whole person in health and illness” after centuries of undermining the professional expertise of its practitioners (p.2). Thus, psychiatry was primarily considered a non-academic way of approaching any mental sign of disturbance.

Additionally, sometimes such early attempts to track the history of mental disorders, including madness, explained the neglect of psychiatrists’ professional roles in favor of superstitions (p. 19). Such ancient reactionary views towards psychiatry contributed to the discrimination against psychologically distressed people creating what is called *stigma*. This concept is originally a Greek word that means “a mark”. It is also referred to as “a sign branded onto criminals or traitors to identify them publicly” (p. 22). Stigma was later used to refer to mentally unstable people due to the pejorative associations of psychiatry across history moving from a mark of criminals to a discriminatory tool against mental patients. It has evolved to discriminate against patients, with authorities manipulating stigma to disfigure intellectuals and criminalize their views. As such, it will be challenging to notice the blurry line between a criminal and a mentally unstable person.

### **Madness: A Myriad of Interpretations and Contexts**

Due to the increasing interest in studying madness as a mental disorder in different contexts, literature then presented a convenient milieu to record and represent such a phenomenon. *Oxford Handbook of Psychiatry* traced the reflections of madness in different social and literary modes and contexts such as

“in the arts, the media, and the political discourse of our societies” (p. 18). The *Handbook* also registers the early attempts to define any form of mental instability as something that “came from the Gods” (p. 18), and it was explained by many critics and philosophers. Firstly, “Plato, who in his *Phaedrus* distinguished four kinds of mad people: prophets, mystics, lovers, and poets” (Gelder, p. 150). Also, Aristotle in *Poetics* states that “poetry implies either a happy gift of nature or a strain of madness (pp. 61-63). As such, it can be realized that the connection between literature and madness is related to divine inspiration and then to intricate associations in contemporary contexts.

Later, during the Age of Reason and Enlightenment, such a phenomenon was studied in the light of “scientific moralism” as the one who is mentally disturbed is considered a “degenerate” with an absence of reason. Later, in the Romantic era, there was an association “in the public mind the archetypal union of madness and genius” (p. 18), and this reflects why it was always valid to connect madness with creativity. Therefore, similar early assumptions about the correlation between art and madness may have justified the stigma of madness that labelled writers such as Marechera especially while bearing in mind that all these assumptions were the legacy of the Western gaze which already underestimates the literary production of the Africans not to mention those who are suffering mentally like him.

Considering the aforementioned Marechera is not the first literary example to depict the repercussions of mental problems. Other works include *King Lear*, *Don Quixote*, and *Jane Eyre*. Shakespeare's *King Lear* features the fool as a delusional character who tells truths, while Cervantes' *Don Quixote* portrays a mad, obsessed, and hallucinating protagonist who is being ridiculed instead of being medically approached (Scull, pp. 41-43). *Jane Eyre*, by Charlotte Brontë, uses madness as a major theme, with the protagonist detained at home before asylums became accepted for insanity (Scull, p. 70). Madness also has been a theme in African literature, as seen in the literary career of South African writer Bessie Head. Her 1973 *almost autobiographical* novel *A Question of Power*, written after her psychotic episode, is considered an autobiographical account of her time in a psychiatric hospital (Davis, pp. 492- 496). As such, madness was often seen as a source of wisdom, a personal dilemma, or a reflection of societal encounters.

The previous variety of representations of madness established the early premise of finding a connection between creativity and madness which was later explained by Sigmund Freud. Freud was originally known for his theories on the unconscious mind, dreams, and psychosexual consciousness. His thoughts on creativity are extensively presented in *Creative Writers and Day Dreaming*. He acknowledged the significance of daydreaming and imagination in the creative process. Daydreams, which involve spontaneous and unstructured thought, allow the mind to explore repressed desires, memories, and emotions and this can create a sort of correlation with the creative process. That's why he compared the creative process to "child's play" or "dreamer in broad daylight" (p. 425). However, the creative writer lives in his reality seriously, "he creates a world of phantasy<sup>1</sup> ... which he invests with large amounts of emotion—while separating it sharply from reality" (p. 421). Such an interpretation of the creative process and the unstructured or unrealistic way of thinking of the creative writer may have also contributed to the underestimation of the product of the creative process not to mention if such a writer was stigmatized as being unrealistic, unstable, or immature. Thus, this interpretation may have constituted the stigma that surrounded the creative process and the creative writer as it will be difficult to believe or acknowledge a daydreamer.

### **Reincarnating The Ship of Fools: Foucault's Concept of Madness**

In his *History of Madness* (2009), a later translated version of *Madness and Civilization* (1961), Michel Foucault critically examines the historical treatment and societal understanding of madness, challenging dominant discourses on mental health. Foucault's work has benefited various fields, including literature, by changing the narrative of power, knowledge, madness, and other social and political concepts. He started by exploring the way madness and different forms of mental disorders were approached starting from the Middle Ages. He states how the mental asylum started first as "leper houses" during the crusades then it was dedicated to the poor and the homeless or hospitals and later it "peopled with the insane" to formulate a sort of segregation around those mentally unstable people (pp. 4-5). Thus, the idea of quarantine also resumed even after leprosy ended but was used against people who were suffering from mental illnesses, especially as it was seen as a disease that was sent by God, and that confinement

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<sup>1</sup> It is a less common spelling of fantasy, according to Merriam-Webster Dictionary as translated and edited in *Collected papers* by Riviere, J., Strachey, A., & Strachey, J.

may be a source of salvation and punishment for their crimes and sins. Thus, “madness entered a space of social and moral exclusion” and mad people were seen as heretics who should be separated from the rest of society (p. 8). Such views, however, started mainly during the leprosy era in the Middle Ages, it continued throughout later encounters with mad people. Its main target was to consolidate the authority of the church by advocating that it was sent by God (p.7). In this way, there was a necessity to replace leprosy with another phenomenon, and that was madness.

Foucault also states that “The Ship of Fools” or *Stultifera Navis*<sup>2</sup> came into existence as a literary theme.<sup>3</sup> However, the idea of Ship of Fools was presented at first as a literary theme, it correlated with the wish to “banish them from inside the city walls, leaving them to run wild in the distant countryside (p. 9). This shows an early wish to expel the *mad people* to disclaim their rights to proper life and treatment. The ship was a metaphor for the societal practice of isolating and marginalizing those who were considered mentally ill. It represents a vehicle that carries away socially undesirable individuals, much like how asylums served to isolate those labelled as mentally ill.

Although the concept of banishing the fool or the mad goes back to the Medieval era, it was revived to conquer specific people in our modern age. This method of banishment, subsequently adopted by various authorities, finds inspiration in expelling and ostracizing those with dissenting perspectives by branding them as mentally unbalanced. This prompts a crucial inquiry into the attribution of authority for labelling non-conformists as mad. Following Foucault's insights in *Subject and Power*, this process represents an endeavor to "objectivize the subject" by endowing the therapist with elevated authority and a distinctive perspective that distinguishes them from others. This is achieved through the decisive role of determining who falls within the realm of insanity and who does not (pp. 777-778). He states that those in positions of power, such as medical professionals, institutions, and the state, play a significant role in

<sup>2</sup> It is Sebastian Brant's extended poem, released in 1494. The English title of the book was *The Ship of Fools*, and the Latin is *Stultifera Navis*; originally in German as *Das Narrenschiff*. “The work is a harsh, scathing, and all-encompassing satire, particularly of the corruption inside the Roman Catholic Church, and it centres on the events on a ship transporting over a hundred people to Narragonia, the land of fools.”, according to *Encyclopædia Britannica*.

<sup>3</sup> Foucault mentioned that *The Ship of Fools* was originally “[a] new object made its appearance in the imaginary landscape of the Renaissance, and it was not long before it occupied a privileged place there; this was the Ship of Fools, a strange drunken boat that wound its way down the wide, slow-moving rivers of the Rhineland and round the canals of Flanders (*History of Madness*, p. 8)”.

shaping and controlling the discourse around madness (*Birth*, p. 51). The pervasive influence of power extends even into the definition of mental disorders, a phenomenon that renders psychiatry, at times, a collaborator with the penal system because they were “the general functioning of the wheels of power” as Foucault thoroughly explained in *Power/Knowledge* (p. 115). As a result, it turns the “technician of medicine” who “would play an economic role in the distribution of help and a moral, quasi-judicial role in its attribution; he/she would become “the guardian of public morals and public health alike” (*Birth*, p. 42). Thus, for Foucault, the early encounters with mental disorders were strictly governed by sociopolitical restrictions, and the clinic turned into a space to practice power.

In the modern age, the same views are still in practice, and that was reflected and exercised in the cultural field. Henceforth, *The Ship of Fool* and the state of banishment were rather reincarnated in our modern society since they claim the upper hand in labelling and stigmatizing the non-conformist intellectuals and creative writers. It was an attempt to prevent them from propagating their views which could become a source of alternative discourse and knowledge that differed from the views propagated by the authority. In this way, *The Ship of Fool* was reincarnated as a metaphor for how intellectuals were banished under the pretext of being mad due to their different or revolutionary views, and in the case of Marechera it can be said that his mental suffering from schizophrenia. Based on this, referring to all forms of mental suffering as madness was very common and intensified the stigmas associated with mental health. However, mental health issues encompass a broad spectrum of conditions with varying symptoms and severity. As such, this generalization was exploited by the authorities to raise doubts towards Marechera’s views by calling him mad to affect the integrity and diligence of his opinions.

## Madness in African Culture

Western psychiatry was prejudiced against the African account of madness. However, after years of acknowledging the Western gaze<sup>4</sup> in explaining any mental health issues; particularly with Africans, there was a serious need to closely analyze the Africans’ psychological and mental issues during the colonial

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<sup>4</sup> For example, British colonizers had to develop their version of psychiatry to exclude the colonized fearing their threatening appearance, so they were repeatedly produced or abused (*Writing Madness*, p. 7). When the first mental asylum was opened in Rhodesia, it was a prison-like experience for the natives (p. 12). Africans were victims of different psychological or medical tests as they were seen by the colonial powers as racially inferior. Ironically, colonial power had difficulty in approaching differences between “normal and abnormal behaviour” done by the natives (*Writing Madness*, p. 13).



era. Frantz Fanon (1925-1961) Martinique- French intellectual played a crucial role in the mid-20th-century anti-colonial movements. In his *Black Skin, White Masks* and *The Wretched of the Earth*, he delved into the psychological repercussions of colonialism and racism on both the colonized and the colonizer. Fanon critiqued the Western gaze of psychoanalysis. He scrutinized its portrayal of the mental life of black individuals. Fanon's writings also contributed to the formulation of a political philosophy for decolonization, highlighting the psychological problems caused by colonialism. He thought that the differences between the black and white worlds were evident as stated by Appiah in his foreword to *Black Skin, White Masks* (p. 1). For example, when black individuals contact the white world; not to mention when this contact is violent, they experience a sense of “collapse of the ego” especially when “the psychic structure is fragile. The Blacks start waiting for validation from the “Other”/ the white to enhance their “status” and “self-esteem”. As such, colonialism became the source of many psychological and mental problems in the African context such as schizophrenia, phobia, and anxiety, according to Fanon (pp. 109-110). Accordingly, Marechera’s suffering from schizophrenia since his early childhood can be attributed to living under a colonial regime which segregated the Zimbabweans in ghettos that were full of violence, poverty, and lack of resources.

Flora Veit-Wild<sup>5</sup> also presented her account of the meaning of madness in African culture. She stated that madness was perceived within “the context of possession rituals or the treatment of mental illness” (*Writing Madness*, p. 2). However, she believes that the theme of madness was not sufficiently explored in African literature; also, she referred to the representations of madness according to Susan Sontag (1933-2004), the American intellectual. In Sontag’s *Under the Sign of Saturn*, she assumes that the mad person is someone with “intolerable behaviour” (p. 2). Madness was the defying tool used by the colonized to “subvert dominant structures of thinking and [violence]of ruling in the colony and the post-colony” (p. 54), within the African context. Sontag additionally stated that “[a] mad person is someone whose voice society doesn't want to listen to; whose behaviour is intolerable, who ought to be suppressed” (p. 64). As such, madness

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<sup>5</sup> Flora Veit-Wild is currently a professor of African Literature at Humboldt University in Germany, who wrote many critical works about his literary production and was Marechera’s girlfriend for some time.

was taken as a pretext to silence any form of opposition, especially with writers who have a history of mental health issues like Marechera.

In this way, it can be ensured that *mad writing*, from the point of view of authority, has always been correlated with violence. However, writers such as Marechera with his battle with schizophrenia did not stop writing due to his mental condition. It was rather an outlet for him to escape the ghetto house<sup>6</sup> or what he called later the *House of Hunger*. He stated in an interview with himself entitled<sup>7</sup> “Escape from House of Hunger” that he has been “influenced to a point of desperation by the dogged through brutalized humanity of those among whom I grew up.” (*Cemetery*, p. 3). For him, ghettos were not only a physical form of restriction, but it was a form of psychological limitation for an angry youth as well. To him, he used provocative writing to challenge colonialism and postcolonial authority, which contributed to his mental distress.

### **Anecdote of the *Enfant Terrible***

Marechera presents a glaring example in the controversial interpretation of madness in the African culture. He is the descendant of a culture which considers madness an emblem of spiritual possession rather than a medical case or even a heightened expression of anger. However, even in the Western arena, his mental condition was always a matter of discussion. For example, he has always been called by critics an *enfant terrible* due to his non-conformist attitude which started from his early childhood in Rhodesia. Merriam-Webster defines *enfant terrible* as a French word which means “a person known for shocking remarks or outrageous behavior” which best describes the attitude of Marechera as a bohemian artist. It is noteworthy that “the name Dambudzo ... in Shona<sup>8</sup> [which is an ethnic language in Zimbabwe] means 'the one who brings trouble'<sup>9</sup>. His parents gave him

<sup>6</sup> Violent conflicts escalated as tensions between the Rhodesian administration represented by white police officers and the nationalist movement grew starting in the late 1950s. Later, when acts of resistance began in the late 1960s, police or the army, led by the colonial authority, conducted routine arrests (*Source Book*, p. 49).

<sup>7</sup> This interview was published as a foreword to his 1983 novella *The House of Hunger*. There are no mentioned reasons for why he was interviewing himself. However, it may have been the effect of being unconventional in his life or maybe he was skeptical towards other interviewers because of his mental health struggle, or it is maybe a result of a previous unpleasant experience. Also, he may have wanted to state certain facts about his views to deconstruct the stigma associated with him and his writings.

<sup>8</sup> The Shona people, who arrived in Zimbabwe over 2,000 years ago, created political entities such as Mutapa, Great Zimbabwe, Mapungubwe, and the Torwa/Rozvi states. During colonial control, "Shona" was used to refer to individuals with similar linguistic, cultural, and political roots, which developed into Zimbabwean culture and political structures (*A History of Zimbabwe*, pp. 10-11). With various linguistic variations, the Shona became a dominant ethnolinguistic group in Zimbabwe. They came from the Shaba region, and they were mostly traders and farmers. (Owomoyela, pp. 9-10).

<sup>9</sup> “The Marecheras called their son Tambudzai, or Tambu for short. Dambudzo is a different version of the same name”. Because of their extreme poverty, when he was later baptized in 1965 by the Anglican Church, he chose his Christian name to be Charles Williams as his mother said (*Source Book*, p. 49).

this name because at the time of his birth they had nothing” especially after his mother said that she was pregnant with him for eleven months in addition to having eight more children. This was quoted in *Writing Madness* after he died in an interview between his mother and Flora Veit-Wild (p. 62).

Additionally, in an online interview entitled *Special Issue on Marechera: Flora Veit-Wild* discussing her publication of the memoir *They Called You Dambudzo*, Veit-Wild explains why Marechera was called the *enfant terrible* of the African literature by saying that he was “received [as] enfant terrible of the African literary scene [who] was famous for acting in a manner that was deemed as particularly unconventional. His unconventional literary and personal choices correlated with the name that was given to him by critics. Additionally, she clarifies that:

His fame and name as the enfant terrible of African literature relates back to the time when he appeared on the international stage and was throwing “cups and saucers at chandeliers”, in the literal and the metaphorical sense. He did so in 1979 at a prize-giving ceremony, when he received, ..., the Guardian Fiction Prize. This action expressed his resentment of being patronised by Western literati, his rejection of being classified and categorized as an “African writer”.<sup>10</sup> (*Hong Kong Review of Books*)

Considering this, he presented a modern incarnation of a "romantic artist" who is “misunderstood, suffering, alienated, and unconventional individual, giving his all to artistic creation and seeing further than “ordinary people” (2013, p. 16). His personality, writings, and biography reflect a “self-created persona of both artist and tramp”, according to Buuck (1997, p. 120). His suffering journey reflects his critical psychological condition and the deteriorating sociopolitical conditions in his country, making him a symbol of an iconoclastic, rebellious, and outspoken artist.

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<sup>10</sup> Unlike many of the African writers, Marechera hated being labelled as an African writer as he believes that writing only for a specific nation or a race was very limited. “In other words, the direct international experience of every single living entity is, for me, the inspiration to write.”, as quoted from Veit-Wild in an interview about his novel *Black Sunlight* (*Source Book*, p. 221). He thought writing only for a nation was very limited as he believed he should be speaking against any form of injustice or generally addressing any subject matter. Additionally, he believed that being enclosed only within his African dilemma is a form of a ghetto that is similar to the ghetto that was created by the colonial powers to segregate the Zimbabwean from the White part of the country; in other words, it is a restraining label that may restrict his own which won't allow him to address any form of racism or injustice. He generally hated any form of classification.

## An Enemy of the Authority

Accusing writers or artists of madness was one of the main reasons for censoring or banning their literary production along with their incarceration in prisons or mental asylums as an attempt to silence their oppositional voices. Their unconventional ideas challenged authority's sociopolitical canon. Dambudzo Marechera's works aimed to challenge colonialism and false narratives about the Black man's history and culture. His goal was to refute such claims and to establish a genuine connection with the African past, deliberately distorted by settlers, to empower the Black man to shape his future (Mlambo, p. 171).

Zimbabwe, once Southern Rhodesia, gained independence from Britain in 1980 after a prolonged war of liberation. Despite high expectations of economic prosperity and political freedom, the postcolonial economy was weak and inflated, leading to socio-economic problems such as violence and poverty (Mlambo, p. 194). The country's economic and political situation were intricately linked, causing hardships for the newly independent African countries (Out, pp. 121-122). The political predicament in the colonial and postcolonial eras provided a valid environment for socio-economic problems.

Dambudzo Marechera was born in 1952 in Rusape, Zimbabwe. His family was affected by the sociopolitical conditions that afflicted Zimbabwe during the colonial era.<sup>11</sup> Marechera couldn't separate himself from the conditions that faced his disrupted family and the deteriorating conditions in his society, as he said in his interview *Escape from House of Hunger* "How can you 'observe' a stone that's about to strike you?" (p. 4). Hence, he believed that the death of his father and the loss of their home marked the beginning of the speaker's physical and mental insecurity, as such, he says "I began to stammer horribly. It was terrible. Even speech, language, was deserting me. I stammered hideously for three years" (p.6). In this way, it can be stressed that his family was the main source of his trauma; however, one cannot be oblivious to the main cause behind their tragic life, which

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<sup>11</sup> Marechera's alcoholic father who once worked as a truck driver was killed mysteriously according to Marechera's allegation in *A Source Book of His Life and Work* (pp. 49-51). He said in an interview with Alle Lansu in 1986 that he was in secondary school when he lost his father, and he said, "we still don't know which army officer did it." He also had to go alone with his mother to the mortuary to identify his father's body. It was a horrible experience to see his father killed in a horrible way "riddled with bullets". However, Veit-Wild and Marechera's brother Michael state in a footnote for this interview that there are many versions of the story of his father's death as they state that his father "was run over by a car when he walked home on the road at night". His brother also stated that he was there with them in the mortuary. These contradicting narratives may have been a direct result of his first encounter with death and the early traces of mental instability (*Source Book*, pp. 11-12). As for his mother, who was also an alcoholic, she worked as a housemaid, and later as a prostitute to be able "to feed her family and secure the schooling of her children". Dambudzo Marechera said "our family was evicted from the ghetto house. It may have been a ghetto house, but it had been our center" (p. 6).

is the crimes of the colonial era which mainly led to their misery and poverty. As such, Fanon's ideas can be recalled explaining the mental and psychological consequences of colonialism which were the main cause behind the miserable life of Marechera's family and their controversial relationships.

His mental problems, however, were not early observed by his family. Michael Marechera attributed his brother Dambudzo Marechera's troubled mental state to a family curse.<sup>12</sup> According to Michael, his mother sought the advice of a *nganga*; a spiritual healer.<sup>13</sup> Marechera, however, believed that family complications, poverty, and lack of resources are owing to the incompetence of the postcolonial authority in Zimbabwe. Consequently, his unstable and miserable family life constructed the early signs of his mental instability. As such, his family did not allow him to understand his mental problems in a context away from the supernatural one. Veit-Wild states that "he suffered from hallucinations, hearing voices threatening and persecuting him", and his principal took him to medical treatment. The principal asserted that his personality was "the combination of his extreme brilliance of mind and uncontrollable behavior" due to the absence of a real caregiver and a role model (2006, pp. 56-57).

Marechera was also deprived of the appropriate chance of university education in both Zimbabwe and England. In Zimbabwe, he was expelled from the Rhodesian University due to participating in massive demonstrations against the racist colonial regime. Also, later in England after receiving a scholarship from the University of Oxford, he was expelled for his frequent conflicts with his professors in England, as stated in *Writing Madness* (p. 57). Accordingly, "he faced the choice of undergoing voluntary psychiatric treatment or leaving college" (Nyoni, 2011, p. 9). Thus, his early life witnessed an unstable lifestyle which was reflected in his works.

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<sup>12</sup> Their mother believed that she was afflicted by the spirit of an angered ancestor in 1969. The *nganga* recommended passing on the curse to one of her children. Wanting to protect her two eldest sons, she chose Dambudzo, the third child. Consequently, Dambudzo began experiencing delusions in 1971, and Michael, a trained scientist, shared this supernatural perspective on his brother's mental state, connecting it to a curse transmitted by their mother (*Writing Madness*, p. 62).

<sup>13</sup> Traditional healers, known as *n'anga*, draw their power from ancestral spirits which shows the active involvement of ancestors in healing practices. *N'anga* consult spirits using divining tools like dice, Shona wooden bones, animal bones, or *mungomo* (seeds). They possess knowledge of medicinal herbs, their applications, and their limitations. *N'anga* also performs exorcisms, sending evil spirits into animals or trapping them in bottles left in the bush. *N'anga* are similar to family priests, and they historically had gifts like finding food or hunting. *N'anga* play a crucial role in identifying and treating ailments, including those caused by witches or wizards (Owomoyela, pp. 35-36). That's why they played a crucial role in Marechera's life and battle with mental illness.

Dambudzo Marechera's harsh criticism of the authorities was reflected in many examples of his literary production. He was known for his outspokenness and often rebellious stance against oppressive systems. His literary works, such as *The House of Hunger* (1978), *Mindblast* (1984), *Cemetery of Mind* (1992), and many other works, explored the impact of colonialism and the struggles of post-colonial Zimbabwe with the national authorities. As such, his literary production reflected a level of commitment that addressed social issues advocating the ideals of justice and equality. Since then, he has been called an *enfant terrible* or mad as an evident accusation of his psychological suffering due to his strong and profound language and highly critical tone. Thus, *enfant terrible* turns to have twofold connotations. The first one is by the authority which is being a troublemaker and a source of harsh criticism, and the other one by people and critics who valued his rebellious and revolutionary views as an iconoclastic voice regardless of his psychological suffering.

### Who Is Afraid of Marechera?

Regarding Marechera's literary choices<sup>14</sup>, he was not merely influenced by other writers, yet the sociopolitical challenges he experienced as a child strongly influenced his psyche. Hence, he claims that "...I have been influenced to a point of desperation by the dogged through brutalized humanity of those among whom I grew up" (Marechera, 2013, p. 1). Having such a traumatizing childhood was reflected in the opening pages of his very first prize-winning novella collection *House of Hunger* which was written in 1978. The setting is in Zimbabwe, and it explores the effects of colonialism and the struggle for independence. The narrative is fragmented, reflecting the disintegration of traditional values. The protagonist, who represents Marechera's persona, battles poverty, political oppression, and personal demons, providing a poignant commentary on the complexities of colonial Zimbabwean society. The novella explores themes of identity, alienation, and the harsh realities of a society in

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<sup>14</sup> In 1980, Dambudzo Marechera published his novel *Black Sunlight*, which, unlike his debut work, received less acclaim. The novel is a revolutionary and chaotic stream-of-consciousness narrative, recounting the experiences of a photojournalist involved with a revolutionary organization. Upon returning to Zimbabwe in 1981, Marechera's mental and physical health deteriorated, leading to his homelessness. He published the last collection during his lifetime, *Mindblast, or the Definitive Buddy* in 1984 which includes four plays, a prose narrative, poetry, and a section from his Harare journal. A novel titled *The Depths of Diamonds* faced rejection due to its obscenity. Marechera's health continued to decline, and he eventually died of AIDS due to his alcoholism, substance abuse, and random relationships. Posthumous publications compiled by Flora Veit-Wild include *The Black Insider* 1990, *Cemetery of Mind* 1992, a poetry collection, and *Scrapiron Blues* 1994, according to *Encyclopædia Britannica*.

transition. The title of the novella mainly depicts the overall hunger, poverty and corruption that Marechera's nation suffered from during the colonial era. He opens his novella by saying:

I got my things and left. .... I couldn't think where to go.... I didn't feel bitter. I was glad things had happened the way they had; I couldn't have stayed on in that House of Hunger where every morsel of sanity was snatched from you the way some kinds of bird snatch food from the very mouths of babes. And the eyes of that House of Hunger lingered upon you as though some indefinable beast was about to pounce upon you. (p. 11)

The previous lines denote the psychological distress and feeling of alienation which Marechera experienced due to the brutal political colonial scene in Zimbabwe. *House of Hunger* does not only represent the personal disappointment or experience of Marechera in colonial Zimbabwe, but it vividly tries to shock his readers by subverting the narrative of colonial power by creating an alternative discourse and knowledge that can abort power's attempts to "objectivize subjects" (Foucault, pp. 777-778). It shows the agony of the protagonist who represents Marechera's persona. It is a critical biography in which Marechera gives an account of his life as a child and a teenager under the grip of colonial powers surrounded by racism, poverty, and violence.

Throughout the quotation, the mention of the "House of Hunger" is metaphorical. It suggests a place that deprives one of sanity, and the comparison to a "bird snatching food", "indefinable beast", and "the eyes of the house" are triggering predatory feelings which adds a layer of symbolism. It reflects the extreme level of savagery and poverty which surrounds him in the ghettos. The major usage of fragmented narrative and uncanny symbols; especially symbols of savagery and death, were reflections of his mental instability and despair. It primarily reflects that such an oppressive environment can cause mental instability and feelings of alienation and despair in addition to setting the tone of later Marechera's writings. This is evident through the utilization of the aforementioned vivid and concrete imagery that strives to provide an authentic portrayal of colonial Zimbabwe. The narrative deliberately diverges from the deceptive storyline promoted by the authoritative figures who label him as mad. This act of stigmatization stems from their manipulation of language and authority, aiming to conceal the truth about Marechera, specifically considering his struggle with schizophrenia.

## Marechera: A Poet in a Dilemma

Although Marechera reflected his literary genius in storytelling, he also valued poetry, so he presented his views concerning poetry in an interview about poetry that was published posthumously in his collection *Cemetery of Mind*. He said that poetry is an endeavour to articulate the inner emotions, intellect, and imagination of an individual (p. 209). The title *Cemetery of Mind* carries a metaphorical connotation suggesting a place where thoughts, memories, or intellectual pursuits are laid to rest or forgotten. The word "cemetery" typically refers to a burial ground for the dead, and when applied metaphorically to the mind, it implies a space where ideas or mental aspects have become obsolete, dormant, or lost.

As such, Marechera's poetry involves spontaneously arranging sounds and words, rather than a "conscious effort". To put it differently, one disconnects the mind from language, allowing words to rearrange themselves haphazardly and in an ever-changing structure as believed by Veit-Wild (2006, p. 53). For example, in his poem *The Bar-Stool Edible Worm*, he says:

I am against everything  
 Against war and those against  
 War. Against whatever diminishes  
 Th' individual's blind impulse.  
 Shake the peaches down from  
 The summer poem, Rake in ripe  
 Luminosity; dust; taste. Lunchtime  
 News – pass the Castor Oil, Alice. (*Cemetery*, p. 59)

This poem expresses a strong stance of opposition, rejecting various elements such as war, those who support war, and anything that represses individual instincts. The language is straightforward, reflecting a defiant tone. The imagery involves the metaphor of "shaking peaches from a summer poem", suggesting a desire to harvest the vibrant and ripe aspects of life. The reference to "lunchtime news" and "passing castor oil" may signify his rejection of unpleasant or bitter realities by comparing listening to the news to swallowing castor oil. Overall, the poem conveys a sense of defiance and a call to embrace the positive and radiant aspects of existence. The refrain of "against" is his way of asserting the idea of being a non-conformist. Also, the poem is signified by fragmented language and imagery in addition to the subtle rhythm which correlates with his belief in the



spontaneity of sounds and words, and it adds music to what is harsh and aggressive. For example, there is an alliteration in the repetition of "r" sounds in "Rake" and "ripe", in addition to the repetition of "p" sound in "peach" and "poem"; also, "the sound "l" is repeated in "luminosity" and "lunchtime", and this adds a level of musicality to the harsh reality that he is suffering from. The usage of fragmented and unconventional imagery may correspond with his lack of an organized way of thinking, yet tracking the subtle meaning and imagery in the poem reflects a deeper meaning that communicates a spirit of rebellion and urges an embrace of the positive and radiant dimensions of existence. Additionally, the imperative verbs are used to show his rage and demand for control in what could seem like an unmanageable situation. The enjambment in these lines helps convey a sense of urgency and directness aligning with the speaker's assertive tone as they express their opposition to various elements. The use of enjambment such as in "Against whatever diminishes/ Th' individual's blind impulse" also contributes to a conversational quality, as if the speaker is passionately expressing their views without pause.

Additionally, the poem is marked by what Dirk Klopper calls "textual madness"<sup>15</sup> which runs throughout his literary production and can be noticed in his aesthetic choices (p. 124). There is a lack of a structured way of thinking with such a fragmented style of writing. Furthermore, by playing around with language and style, he creates a flow and connects the ideas. As such, he violates the rules of canonical poetry by breaking the pattern of the rhythm, and at the same time, he breaks the stereotype of being an African by writing in English and rejecting to write in Shona because for him it was the language of the ghetto that he tried to escape from (*House*, pp. 6-7). He reflects on how he rejects all the norms and all the lies propagated by the authorities to blind the citizens. In this way, it can be assured that although he suffers from hallucinations and schizophrenia, this has not prevented him from speaking the truth.

In *Identify the Identity Parade* he reflects on his personal dilemma as an intellectual with different views by depicting the role of the poet in a society that makes him feel rejected:

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<sup>15</sup> Klopper uses "textual madness" to refer to Marechera's style in his poem *Throne of Bayonets*. However, it distinguishes his writing style generally as he breaks the canonical literary boundaries and tends to "do experimental, seemingly arbitrary, and heterogeneous discursive strategies" (*Emerging Perspectives*, p. 124).

I am the luggage no one will claim;  
 The out-of-place turd all deny  
 Responsibility;  
 The incredulous sneer all tuck away  
     beneath bland smiles;  
 The loud fart all silently agree never  
     happened;  
 The sheer bad breath you politely confront  
 with mouthwashed platitudes: "After all, it's  
     POETRY."

....

The pervert every honest citizen surprises  
     in his own mirror: POET. (*Cemetery*, p. 199)

Throughout the poem, Marechera sought to establish his identity as a poet amidst a constantly imposed sense of alienation by society and authority. This enduring sense of estrangement became a pervasive force in Marechera's life, compelling him to assert his poetical self against the relentless currents of isolation. He externalizes his feelings of alienation and lost identity which can be reflected in society's gaze which calls for his banishment due to his revolutionary literary choices which are seen as a sign of madness, so he deserves such feelings of estrangement or "out-of-place", as believed by authority. This could reflect Foucault's *Ship of Fools* which shows that dealing with insurgents or different literary geniuses is a reincarnation of the banishment of the mad, in this case, the non-conformist writer Marechera. The usage of words like "luggage," "turds," "sneer," "fart," and "bad breath" contributes to the antagonistic and unfiltered poetic diction. The usage of such words evokes strong images distinguishing the defiant style of the poet and his rejection of the refined language. The metaphors might symbolize aspects of the poet's lost identity making him unnoticed or unappreciated by society. They also reflect deep pain and agony and how feelings of inferiority are deeply rooted inside his psyche which intensifies his mental disorder. The fresh images of "mirror and poetry being "bad breath" and "loud fart" are both daring and extremely fresh and assertive of his role as a non-conformist who challenges the conformists in his society. The use of "luggage" is a metaphor that implies being a burden, while the term "turd" suggests that he is *something* unpleasant or rejected by his society. Also, the mention of antitheses

as “loud fart” and “bad breath”, treated with denial and politeness, adds a touch of humour and irony. The overall tone appears to be a mix of irony and agony, yet at the same time, it reveals that he is self-aware of his value as a poet. There is also a commentary on societal perceptions of unconventional or challenging expressions in the context of poetry.

The poem may symbolize the discomfort or disregard often associated with unconventional audacity in facing the authority with the truth that is reflected in the antithesis by being “a pervert surprising an honest citizen in the mirror”, using provocative language that annoys the comfort of *brainwashed* citizens. Although the lines do not follow regular meter, there is a subtle sense of rhythm in the flow of words and phrases. For example, the repetition of the words “POETRY” and “POET” creates a rhythmic pattern because of alliteration that also appears in the repetition of the “p” sound in many examples such as “politely” and “platitudes”. This could be a metaphor for how poetry often challenges social norms. Also, the use of the words “POETRY” and “POET”, capitalized, suggests a self-acknowledgement of his identity as a poet, which is rejected by his society, and results in a circulating stigma of madness that devalues his literary production, but it didn’t stop him from facing any form of injustice.

### **Marechera: Mad or Criminal?**

Marechera was not only affected by the stigma of madness but his rivalry with the authority extended till he “had been detained for short periods before as a result of his heavy drinking and quick temper, outspoken views and bohemian life-style” (*Index on Censorship*, p. 28). After returning from England to Zimbabwe in 1981, he was arrested during the Zimbabwe Book Fair<sup>16</sup> in 1984 while he was waiting for the publishing of his collection *Mindblast*. Marechera is the true embodiment of the enfant terrible who is living his life to the lees with a hungry heart fearless of the consequences, as Tennyson said in *Ulysses*.

Due to having an unstable life, Marechera’s relationships with the surrounding atmosphere in newly independent Zimbabwe were full of doubts as he distanced himself from real affection with his loved ones in addition to his

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<sup>16</sup> His book *Mindblast* was scheduled to be released at the Second Zimbabwe Book Fair in 1984. However, copies were not available for the Fair's opening due to claims of last-minute publishing house issues (*Index*, p. 28). During the fair, Marechera spent four days in the Harare Central Police Station till the fair ended. His arrest happened after being interviewed by two Dutch radio journalists, and subsequently, he was taken into custody. During the interview, he fearlessly answered the questions of the journalists, and he severely attacked the policies of Prime Minister Mugabe. Marechera stayed at the police station while the officials released the journalists (*Index*, p. 27).

wavering interaction with educational or literary institutions. Although he sought their acknowledgement, he wanted to go beyond their control, according to Klopper (*Emerging Perspectives*, p. 123). These unstable relationships raised the question of “madness” since he treated the surrounding atmosphere with a sense of alienation and uncertainty; especially after his homecoming to Zimbabwe in 1981. That glaring sense of alienation was reflected in his controversial collection *Mindblast* in which he published his most iconic and researched poem *Throne of Bayonets* in which “he criticizes the Mugabe regime and its superficial socialism” (Armstrong, p. 184). The title of the collection is a reference to the creative process which has a sudden and intense impact on the mind or a powerful mental experience. As for the title of the poem, *Throne of Bayonets*, it shows a direct attack against the postcolonial Zimbabwean regime that secured its sovereignty, “throne”, by using violence and “bayonets”. Through the poem, he reflects on his personal turmoil and despair, and that is clear in the opening lines of the poem:

Where to sit still  
 And slam the door  
 Against fear of tomorrow?  
 Brute black rain  
 Pummels my brainpaths  
 Unleashes areas of despair  
 In my once sunlit memory.  
 Nothing but blows and kicks  
 Greet the friendly eye of thought  
 Which bloodied muddied shakes the dust  
 To all humanity  
 And discovers terror the totem of truth. (*Mindblast*, p. 89)

Marechera’s persona in the poem reflects on negative emotions that overwhelmed him in the post-independence era. After years of suffering from colonialism, he was deeply stricken with despair after promises of prosperity made by the government. The diction shows a sense of despair is reflected in the usage of metaphors such as "brute black rain" that "pummels" their mind which reflects a sense of chaos, violence, and internal struggle with the negative feelings due to

the deterioration that he is witnessing. He also reflects on the usage of oxymorons the representation of the schizophrenic environment that he was living in as he is torn between memories that were once "sunlit" but have now been overwhelmed with despair. The lines exhibit a more vivid rhythmic flow, marked by a combination of enjambment. There is an alliterative repetition of the "b" sound in "brute", "black," "bloodied", and "blows", which adds a rhythmic quality to the poem. Additionally, there is a noticeable repetition of the "t" sound in the same line in "terror" "totem", and "truth" which creates an increasing sense of the music of the line to carve the importance of truth in the mind of the reader.

The imagery in the poem, as such, suggests a profound change in the speaker's perception of the past regardless of the colonial legacy that triggered his mental suffering. Thus, he poses many questions regarding his sense of alienation; whether to continue this choice and ignore the fear of tomorrow, especially with the problematic situation that intensified his predicament. He shows how the intellectual pursuit in his country as represented in the "friendly eye of thought" is being "greeted" by nothing but "blows and kicks" which is personification that reflects the hyperbolic usage of sheer violence to silence and blind any form of opposition. However, he tried to rise above all the problems by "shaking the dust", but his attempts were met by "blood" and "mud" which again raises the idea of contradiction between what he is doing and the harsh reality of his country. Nevertheless, he believes that someday all humanity regardless of the suffering will be able to disclose "the totem of truth" or the most preserved truth despite the surrounding "terrors". The opening lines of the poem touch upon the fact that writing can be a form of either escape or resistance and raise the idea of the contradiction that surrounds a non-conformist writer such as Marechera. It raises the question of madness— is he really mad or schizophrenic, or he is just surrounded in his reality by signs of schizophrenia and madness? However, the answer can be that despite his struggle with his personal demons he was fully aware of the surrounding deterioration.

The analysis of his literary selections highlights the recurring pattern of branding his full name Marechera, a non-conformist writer who is suffering from schizophrenia, as mad to suppress his voice. This justifies the use of Foucault's paradigm to examine the impact of power on the definition of madness and its role in shaping his literary narratives. Marechera's mental struggle is a result of fighting omnipotent oppressors whose perception of ideals as justice and freedom

contradicts with what he believes in. Thus, fighting against unrealistic or schizophrenic ideals propagated by the authority may have led him to such deteriorating mental conditions since he was traumatized by the lack of integrity and injustice on many levels.

## **Conclusion**

Madness has been a social concept throughout history, with various interpretations due to a lack of knowledge and education. It has evolved beyond physical and mental disturbances to include challenging opinions. The paper explored the correlation between madness and power, focusing on the writings of the Zimbabwean writer Dambudzo Marechera. Many of Marechera's writings protested colonialism and dismantled its false narratives, demonstrating the complex relationship between mental instability and literary genius. Despite suffering from mental health issues, Marechera remained an antagonistic voice who spoke against injustice, seeking ideals and love despite the stigma of mental illness. The assertion of Marechera's madness was manipulated to discredit his reliability and cast uncertainty on the genuineness of his literary creations, especially in the aftermath of his schizophrenia diagnosis. He was a restless soul tormented with a hungry heart which made him a traveler searching for ideals and love everywhere regardless of his battle with the stigma of his psychological challenges.

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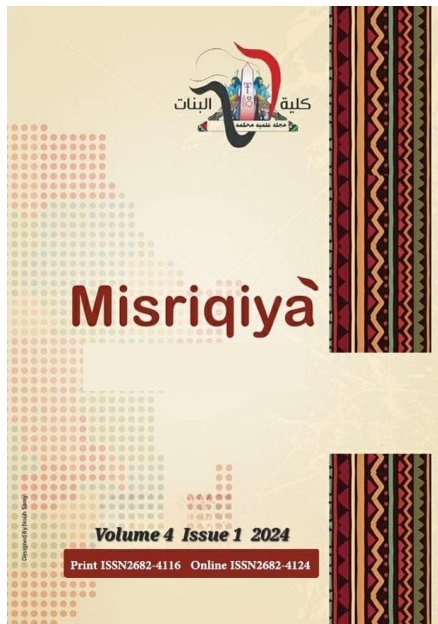
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## A Strategy Plan to Forecast Fashion Trends that Meet the Requirements of the Egyptian Market

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### Abstract

The change in consumer behavior toward purchasing clothes has led to the emergence of a production method called fast fashion. This depends on copying the latest fashion trends at the lowest cost, and in large numbers. The ultimate goal is to ensure consumer satisfaction while minimizing returns. This study aimed to predict fashion that meets the requirements of the Egyptian market in three steps. Firstly, analyze some global fashion trends for the years 2024-2025. Secondly, identify the extent to which the consumer follows fashion trends and the factors affecting his purchasing behavior through a questionnaire, as well as field visits to some Egyptian factories and production decision-makers. Thirdly, redesign a group of international fashion clothing and conduct a survey of specialists in order to create a strategic plan to learn how to predict and redesign some international fashion trends and acquire new ideas to meet the needs of the Egyptian consumer.

**Keywords:** *strategy plan, forecast, fashion trends, requirements, redesign, Egyptian market*

## **A Strategy Plan to Forecast Fashion Trends that Meet the Requirements of the Egyptian Market**

### **1. Introduction:**

The fashion clothing industry is linked to human existence, and it is an industry of great importance in human life. It also has functional importance as a means for a person to express himself and his identity. Fashion changes with each period of time, and its life cycle differs from other fashions in the degree of acceptance it has achieved among consumers. Fashion trends throughout the ages tell stories, cultures, civilizations, and events that people have experienced, and therefore it is an industry that occupies a great place in the world (El-Okda, 2016, pp.149 -157). With the increase in consumer requirements and the change in purchasing behavior, a new style has emerged called fast fashion that meets consumer requirements. Through what fashion designers in international fashion service agencies issue, as they give an overview of a new season, through the fashion trends and the upcoming global forecasts issued every three months; it serves as an indication of innovative creative ideas used by fashion designers around the world in designing and preparing coordinated clothing collections (Mohamed, 2014, pp.202-203). But many factors and characteristics influence consumer purchasing behavior. A purchase decision and habits are a result of different factors, such as culture, subculture, social class, personality, psychological factors, societal environment, etc. Hence came the idea of conducting research to provide redesigns or remodels of international fashion designs to meet Egyptian market requirements. Therefore, we have many important questions that need answering:

- Does the Egyptian market follow international fashion trends as they are?
- Is the Egyptian consumer interested in following international fashion?
- Are there cultural, social, and economic factors that control the Egyptian consumer's acceptance of fashion?
- Are there factors that interfere in the decisions of factories and companies producing clothing in Egypt?
- Does international fashion need to be redesigned to suit the local Egyptian market?

By reviewing previous research and studies related to strategy planning, fashion design, and fashion forecasting in the clothing industry, it became clear

that there is a scarcity of strategic plans for clothing companies in the Egyptian market in the field of producing fashion. Among those studies are:

1- Alan S. Gutterman (2023), pp. 1-54, Introduction to Strategic Planning. The study examined the method followed in using strategic planning for major companies, as strategic planning is of fundamental importance for every company, regardless of the size of its business, the time and other resources available to the company, and investment in developing, documenting, and implementing the strategic plan.

2- Enas. A. El-Okda (2016), pp. 149-157, the strategic plan for the fashion design process inspired by ancient Egypt (the pyramids as a case study), where the study dealt with the method of developing a strategic plan for the fashion design process, inspired by the ancient Egyptian civilization, where the study aimed to analyze fashion designs inspired by ancient Egypt in three proposed ways to deduce the concept used in the design and gain new ideas for new fashions in new ways.

3- Dina Lutfi Hamed (2022), p.103, Clothing Marketing Strategies and Their Role in the Success of Brands, “An Analytical Study”, Heritage and Design Magazine. The researcher dealt with a detailed study of clothing marketing strategies in international clothing companies, for small and start-up local companies and factories to follow in choosing and designing an appropriate strategy for them. The research also addressed the importance of studying marketing strategies and the extent of their application in the fashion industry.

4- Rawda Ahmed (2022), pp.202-207, on the role of artificial intelligence applications in fashion design and fashion forecasting in the ready-made clothing industry, “An Analytical Study”, where the subject of the study addressed the importance of artificial intelligence and its uses in design and fashion forecasting and in the various stages of production in ready-made clothing factories. It also paid attention to Study using different research tools in applying the research objectives.

5- Sherine Sayed Mohamed (2017), pp.65-75, a study of the impact of fast fashion on sustainability in the field of fashion design for women, where the study dealt with an analytical approach to the impact of fast fashion on production and the applied approach by presenting a sustainable strategy for Egyptian ready-to-wear design and production companies and their marketing sectors by studying the

opinions of those who take it. Manufacturing decision of ready-made clothing companies.

6- Sherine Sayed Mohammad (2014), pp.202-203, a study of the role of formula plates in fashion design, dealt with the importance of studying the formula plates for fashion in international fashion as an important source of inspiration for the clothing industry and studying what it provides in terms of a general view of a new season with its innovative ideas.

### **1.1. Research Problem:**

- The international designs of fashion agencies find that it is important to introduce innovation in their designs every season, but do they understand the diverse requirements and needs of consumers in different countries around the world? Do they take into account the different social identity, culture, history, values, principles, and economic aspects of one society compared to another?
- Local clothing companies are exposed to difficulties in determining the features of the current global fashion trend and the extent of the possibility of risk in implementing it for the local Egyptian market, as it requires the availability of product redesign to ensure consumer satisfaction while minimizing returns (Jackson, 2007, pp.168-187).

### **1.2. Research Objectives**

The research aims to:

Design a collection of clothing that follows international fashion trends and meets the needs of consumers and clothing producers in the local Egyptian market, through:

1. Collecting and analyzing information about some global fashion trends from websites between 2024 and 2025 to understand the different methods of inspiration (Colour, material, sources of inspiration, and fashionable pieces of apparel).
2. Conducting a research study using a questionnaire for the local factories and production decision makers in ready-to-wear garment factories and companies as well as the specialists in the field of clothing and the Egyptian consumer to identify the extent of his susceptibility to international fashion trends, learn about his purchasing behavior, and analyze the results statistically

- 3- Comparing the results of the analysis of international fashion trends with the analysis the results of the Egyptian consumers' opinions on following fashion and their purchasing behavior to identify the strengths and weaknesses of international fashion in relation to the requirements of the Egyptian market to ensure consumer satisfaction while minimizing returns.
- 4-Redesigning a group of international clothing fashions using the CLO3D program (Huang, 2022, p.11) as a proposed illustrative model to predict upcoming fashion trends suitable for the Egyptian market.
- 5-Developing a strategic plan to forecast fashion trends suitable for the local market to assist specialists in the field of clothing production.

### 1.3. Significance of the Study

The importance of the research lies in:

- Producing designs that are modern and compatible with international fashion trends as well as the values and habits of Egyptian society, as a result of analyzing the designs of foreign fashion forecasting agencies and identifying the requirements of the consumer and the Egyptian market.
- Working to link the academic field with the industrial field by providing clothing production companies with new and innovative working papers that follow international fashion trends, but in a way that is compatible with the local Egyptian market.
- Providing the academic library with modern scientific research to complete studies related to the field of clothing and fashion production.

### 1.4. Research Methodology

- An analytical approach is followed to analyze the production methods of forecasting agencies for international fashion forecast boards, in addition to analyzing the results of the questionnaires.
- Applied approach is to provide proposal designs that meet the requirements of the Egyptian local market for clothing products.

### 1.5. Research tools

The search tools consisted of:

**First:** There are four types of questionnaires:

- Interviews: field visits to some local factories and production decision- makers in ready-to-wear garment factories and companies (15 factories) to answer some questions face-to- face.

- Validity and reliability of the questionnaire:

To ensure the validity and reliability of the questionnaire, which includes four items, it was presented to number of (13) specialists in the field of clothing and textiles who are faculty members in various colleges affiliated with Egyptian Universities.

- An electronic questionnaire prepared using “Google Form” in a multiple-choice style, directed to the specialists in the field of clothing (13 specialists) and a random sample of Egyptian consumers (368 consumers), which includes two main axes to measure:

- Egyptian consumer behavior in following international fashion trends and includes 16 items.

- Consumer behavior in purchasing clothing products, includes 16 items.

The questionnaire also includes a set of important variables related to gender, age group, educational level and governorate.

- An electronic questionnaire prepared using “Google Form” in a multiple-choice style to define the opinions of specialists in the field of clothing and textiles (22 specialists) to determine the success of the proposed designs that have been redesigned from international fashion, which includes ten main statements to measure the extent of acceptance of the redesigned design in terms of (design - colour - social and marketing aspects... etc.)

Note: All questionnaires also include a set of important data related to (e- mail- gender - age group - educational level – governorate- job).

**Second:** Using electronic programs:

- Google Form: To create an electronic questionnaire for easy communication with consumers

- SPSS statistical program version 21: To analyze the results of the questionnaires

- “*CLO 3D 7.3.197 fashion design software program*” to redesign some international designs as a proposal to meet the requirements of the Egyptian market (Huang, 2022, p.11).

**Third:** “*TripleLicart Scale*”: to analyze the results of the questionnaire used to determine the success of the proposed designs that have been redesigned from international fashion.

## 1.6. Research Limitations

- Foreign websites: to learn about international fashion trends.
- Arab Republic of Egypt: to collect the opinions of a random sample of Egyptian consumers from different governorates as well as specialists in the field of clothing and textiles, in addition to a group of factories and companies producing clothing within the local Egyptian market.

## 1.7. Research Hypothesis

To what extent can a strategy be planned to forecast fashion trends that meet the requirements of the Egyptian market?

From this main question emerges the following hypothesis:

- To what extent do Egyptian clothing companies keep pace with international fashion and apply global forecasting?
- Does the degree of acceptance of consumer behavior in following fashion and in purchasing clothing products vary depending on the variable (gender, job, level of education, age group)?
- What is the degree of acceptability of the behavior of the specialist in following fashion and in purchasing clothing products?
- What is the degree of acceptance of consumer behavior in following fashion and in purchasing clothing products?
- Is there a correlation between the behavior of the specialist the consumer in following fashion and purchasing clothing products?
- To what extent have the proposed clothing designs been successful, according to the opinion of specialists in the field of clothing and textiles?

## 2- Theoretical Framework

### 2.1 Fashion

In Oxford Learner's Dictionaries (2023), the word "fashion" is defined as a movement, process of making, style, prevailing custom, something popular for its use, or tradition.

It is used in dress and lifestyle; "fashion" is also defined as the way of dressing, etiquette, and style of expression that society adopts at the present time (Gutterman, 2023, pp.1-54).



The terms "fashion" and "clothing" tend to be used synonymously, but they differ in that fashion conveys a number of different social meanings, while clothing is the general materials/components of what a person wears, such as clothes, garments, attire, garb, apparel, and costume (Mohamed, 2014, pp.202-203).

Fashion expresses the spirit of every time and reflects the changes that societies are going through, which leads to an increase in demand for clothing by both consumers and producers (Gutterman, 2023, pp.1-54).

### **2.1.1 Fashion Trends**

A trend is everything that is popular at a particular time. It means the fashions that are popular at the moment and is a term commonly used in relation to fashion and the fashion industry.

The science of fashion trends is a deep and complex science that depends on specifications specific to each trend and has a timeline and relationship to consumer psychology (Jackson, 2007, pp.168-187).

## **2.2 Forecast**

Forecasting is a tool used to obtain future demand based on past demand information. It is used by designers, manufacturers, retailers, marketers, and executives to give creative dynamism to their brands to achieve an increased competitive advantage in the market. The position of forecaster at the manufacturing level is a demanding job that carries with it heavy leadership responsibilities rooted in the practical jargon of news, production, and salability (Cataldi, 2017, pp.22-46).

It is an art that relies on predictions that are based on intuition, judgment of good events, and creativity. It is also a science in which forecasters rely on analytical concepts and models to predict upcoming fashion trends in systematic ways (Bandinelli, 2013, pp.5-31).

### **2.2.1 Forecasting Trend Process**

The creative process can be understood, practiced, and applied by anyone with the tools. Also, there is a need for a balanced vision that seeks new approaches that break the cultural edge, the reality of demographic change, and identify fads-the long wave of change. That uses product planning to gain market share and position products against competitors, shape combinations, style trends, and colour, as well as textile trends (Cataldi, 2017, pp.22-46).

## **2.3 Fashion Forecasting**

A creative process is used to predict fashion trends for the coming seasons. It depends on a systematic procedure including collecting information, market and consumer research, and analyzing data and information about everything related to fashion (Ali, 2022, pp.202-207).

### **2.3.1 Fashion Trend Forecasting**

A global career based on future trends in fashion, starting 20 months before the target season.

An analytical process for data collected from different trends in the fashion industry is formulated through the vision of forecasters and specialists using statistical methods to avoid error and achieve the best results required in the future (Mohamed, 2014, pp.202-203).

### **2.3.2 Fashion Forecasting Process**

A process that includes the main lines of understanding the business vision and the main profile of the target customers, collecting information about available products, preparing and identifying trends, and choosing appropriate products for the company and the target customer. It depends on the colour and style that are important to expect from consumers and retailers (Bandinelli, 2013, pp.5-31).

### **2.3.3 Types of Fashion Forecasting**

Long-term forecasting: It depends on forecasting trends for five years or more in the future in all areas of life, especially in the direction of the fashion industry. It is based on design, production, and retail sales. This type of forecasting contributes to the strategies of developing fashion industry companies and making decisions related to redefining locations, expanding product lines, starting new businesses, and building a new brand (Ali, 2022, pp.202-207).

Short-term forecasting is based on forecasting trends from one year to two years in the future based on the latest products in colour, fabric, style, and appearance (Ali, 2022, pp.202-207).

## **2.4 Global Fashion Forecasting Agencies and Companies**

Trend forecasting agencies act as consultants to large companies. Their role is to analyze social trends that affect the consumer. Their target customers are in the

retail, technology, finance, automotive, food, and fashion and creative industries. The agency serves those who are looking for new ways to communicate, develop new products and strategies, and advance company thinking on the key issues their organization faces. These services can be customized or purchased by an annual subscription. Small or large conference activities are regularly held by larger trend forecasting agencies to share the latest knowledge with clients. These larger agencies also provide additional workshops, presentations, and newsletters to provide the “most important” information weekly, quarterly, or semi-annually (Cataldi, 2017, pp.22-46).

There are many of these international agencies that determine fashion trends (Ali, 2022, pp.202-207). The most prominent of these agencies that provide seasonal forecasts for each of (Fall/Winter - Spring/Summer) are (Promo style-WGSN, CBI, Trendzoom, Heuritech, etc.) (Cubbin, 2023):

- **Forecasting agency (Trendwatching.com)** is a company that bases its information primarily on intuition as well as conduct market research surveys and also focuses on online research and the information they receive from thousands of “trend watchers” from around the world (Jackson, 2007, pp.168-187).

**There are several methods by which agencies rely on trend forecasting:**

1. Following fashion news through exhibitions that are held over two seasons during the year, namely, colour trends exhibitions, textile trends to determine the trend of the season in fashion and lifestyle, focusing on colour and materials used and the new style.
2. Studying the consumer through questionnaires to identify a group of specialized people and a group of demographics to learn about lifestyle, behavior, age, and other preferences that are used to determine the target market. Questionnaires are used to better understand consumer behavior (Ali, 2022), pp.202-207.
3. Developing an analytical plan for the structure of the formulation boards in general to determine what is likely to happen next by analyzing the data by fashion forward experts to determine a deep vision of consumer behavior.
4. Studying social and economic trends and events on the scene in general that affect society due to cultural changes and transformations in lifestyle, which reflect changes in the age groups of generations in general and youth in particular. The level of the economy affects purchasing decisions on a large scale and wide-ranging transformations cover industry lines.

5. Analyzing trends to explore short-term trends and long-term trends that affect production prospects and trying to combine previous forecasting methods.
6. Providing analyses of the seasonal trend competitively with different agencies by researching innovative plans and capabilities through various information sources so that this allows measuring activities among competitors and developing an accurate vision of the market environment (Ali, 2022, pp.202-207).
7. Trying to explore the spirit of the times and combine cultural components that suit it and the ability to coordinate between these components by coordinating across product categories and fashion trends (Ali, 2022, pp.202-207).

## 2.5 Strategic Plan

### 2.5.1 Planning

“*Plan*” means the process of setting goals and choosing means to achieve those goals. It also means the process of determining the courses of action and procedures required to achieve goals. The plan is determined by what must be done to achieve the final goal. It consists of deciding in advance what must be done, who must do it, and how it should be done (El-Okda, 2016, pp.149-157).

### 2.5.2 Strategy

The term “*strategy*” has its roots in the Greek "strategia", meaning "the art of war," so transferring this term to management would mean, at least initially, "the art of management or leadership (9).

- “According to Chandler Alfred, preparing the basic long-term goals and objectives of the organization, selecting action plans, and allocating the necessary resources to achieve these goals (Ali, 2019, p.434).
- “According to Harvard School, the set of decisions that are important for the organization’s major choices, related to adapting the organization to change as well as determining the basic goals and movements in order to reach them.”
- For Chandler, it is setting long-term goals and allocating resources to achieve these goals (Ali, 2019, p.434).

### 2.5.3 The Strategic Plan

It is an important tool for directing the organization's work that helps maintain a focused, long-term vision of the organization's missions and goals. It also helps in making decisions related to the allocation of human and financial resources. The success of an innovative strategy can be measured through novelty, the degree of change or impact apparent in the project, or through the organization's ability to renew or change the strategy of the main organization, which reflects the strategic planning process of values and work culture (El-Okda, 2016, pp.149-157).

Planning is an aspect of great importance in strategic thinking and the field of management. By working on the basis of a strategic plan, the work team is able to think creatively and focus on business directions and main work. The team approach is strengthened by clearly defining the focus and direction together and developing plans in cooperation with partners. Beneficiaries and other designers provide a general framework through which they can monitor progress, learn from experiences, and make the necessary changes to improve the effectiveness of performance (El-Okda, 2016, pp.149-157).

### **2.4.3.1 Structure of the Strategic Plan**

The strategic plan determines how to investigate the vision, as the strategic plan begins with the evaluation by identifying problems (El-Okda, 2016, pp.149-157), strong and weak points, and then analyzing them. The following key steps must be taken to achieve the correct vision and the goal of the strategy:

- Choose the vision and mission clearly.
- Aim and objectives: the main steps to achieve the goal.
- Current market studies: collecting information and photos about international fashion and its trends, in addition to gathering consumer and product requirements within the Egyptian markets.
- Current market study analysis: identify strengths, weaknesses, and opportunities.
- Target group: Who will the strategic plan benefit from?
- Design a strategic plan. It will help identify important areas and points where factories and producing companies need to make choices and decisions.
- Action steps: How will it be implemented? Why?
- Conclusion: evaluation of previous steps.

### **3. Experimental Work**

To achieve the goal of this research, the following steps were implemented:

3.1 Collect and analyze information and photos of the current and upcoming season's events for global fashion trends and international fashion forecasting agencies for 2023 and 2024 to help understand and build the strategic plan.

3.2 Conducting an interview with manufacturers and producers of clothing for the Egyptian markets to identify the important factors that must be taken into account to meet the desires of the local Egyptian market, with analysis of the results.

3.3 A questionnaire containing 4 items was presented to 13 specialists in the field of clothing and textiles to ensure the validity and reliability of the questionnaire regarding the opinions of Egyptian consumers.

3.4 A questionnaire was built using Google Forms to define the opinions of Egyptian consumers the study sample consisted of 368 consumers about: (a) consumer behavior in following fashion including (16) items; and (b) consumer behavior in purchasing clothing products, including (16) items; with analysis of the results.

3.5 Building a strategic plan: reading and analyzing global fashion trends and Egyptian consumer's demands, then determining the accepted local market fashion direction by copying or redesigning the global fashion one.

3.6 Several photos of different global fashion designs for the current seasons (2024 and 2025) were collected and redesigns by the researcher to meet the local Egyptian market.

3.7 A questionnaire was built using Google Form to define the opinions of specialists in the field of clothing and textiles 22 specialists to determine the success of the proposed designs that have been redesigned from international fashion.

3.8 All questionnaires were statistically analyzed to derive results and recommendations using SPSS statistical program version 21.

### **5. Research Results and Discussion**

#### **5.1 Creating a Strategy for Following Fashion Trends According to the Requirements of the Egyptian Market**

To achieve this goal, in order to start producing fashionable clothing, it is important to develop fashion design skills, study updated international fashion trends, and know consumer and market requirements. Then comes the planning,

design, and development stage of some of your own designed clothing collections, and then present to specialists, consumers, clothing producers, and retailers. And learn from the positives and negatives.

### **5.1.1 Aim of the Strategy**

Information was collected, and several images of fashion designs that follow international fashion trends for the years 2024-2025 were collected and analyzed by the researcher. Then information was collected and analyzed about the extent to which fashion lines are followed by the authorities specialized in producing clothing in the Egyptian market. In addition, the researcher conducted a questionnaire to identify the behavior of specialists as well as consumers in following fashion and purchasing clothing products; to gain ideas, those designers need to build up their new designs that follow international fashion while preserving the requirements of consumers in the local market.

### **5.1.2 Current Market Studies**

Collect information about global fashion trends for the years 2024-2025 from the internet, fashion magazines, fashion shows, fashion houses and designers, blogs, and international fashion institutions. In addition to Egyptian producers, specialists, and consumers to learn about the requirements of the local market.

### **5.1.3 Analyze the Collected Information**

After analyzing the information from the previous review; to allow a more open interpretation of the content of the strategy, it became clear:

- The specification of international fashion trends for 2024-2025.
- The method used to produce fashion by local producers.
- The behavior of specialists and consumers in following fashion and purchasing clothing products.

### **5.1.4. Target Group**

This study wants to present work that may help those interested in the field of fashion, such as clothing producers, retailers, fashion and textile design students, local designers, people working in related fields, and people interested in their own projects.

### 5.1.5 Action Steps

To implement the strategic plan. The following steps are suggested to help the target group identify tasks that can be done to achieve the business goal:

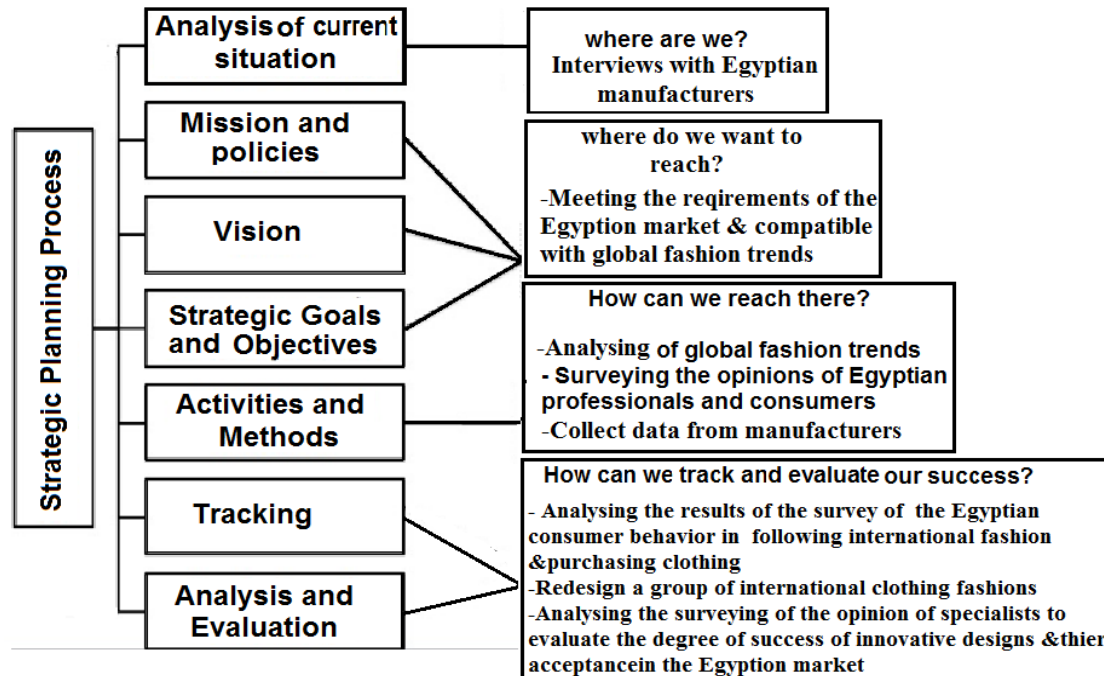


Diagram 1. Flowchart of a strategic planning process modified by the researcher

Tracking is a very important part of strategic planning. It allows management to be aware of the current situation regarding the objectives and if there is a need to review them or make any change. For this reason, the evaluation process can be conducted twice a year, one in the middle of the year and the second at the end of the year to examine any violation or feel confident about what has been achieved. Therefore, it should include comments, reports, and reasons for unachieved goals.

#### 5.1.5.1. Information and Photo Collection and Analysis of International Fashion Trends

Photos and information about international fashion trends for the years 2024 and 2025 were collected and analyzed by the researcher, focusing on four important elements: colour, material, and sources of inspiration, in addition to clothing pieces and their composition (Table 12).

##### 5.1.1.1 Information and Photo Analysis of International Fashion Trends



## -Colours

Forecasting colour trends is a process where creativity, research, and data analysis come together (Table 1). Colour trends are constantly touching every point of our lives as consumers look to keep up with social culture and reflect on their wants and needs. Forecasting agencies use large-scale models that take into account global macro - impacts including economic, political, and societal shifts; more nuanced cultural and psychological consumer behavior patterns; and seasonal influences, including retail purchasing events and holidays, to predict consumer purchasing habits and preferences (Forecasting Colour Trends, 2024).

- Soft shades are dominating Spring/Summer 2024, ranging from traditional pastels to dark cherry reds. Designers played with shades of blue, green, pink, purple, and yellow in both pastel and jewel tones, such as: powder blue colour, pistachio, purple, a soft shade of pink, almost navy (the shade has a little bit more pigmentation than classic navy), canary yellow, forest green, silver shimmer, lavender haze, bright and strong bold shades of red, shades of green, pale yellow, purple, lilac, white, chocolate brown (Hannah, 2024).
- Grey is a staple for many year-round wardrobe-wise, and the darker shade of charcoal grey was prominent (Hannah, 2024).
- A combination of bright colours with rich natural tones: blue, green, orange, earthy brown, mustard, fiery and impassioned red, yellow, burnished Lilac, a tinged and smoky lavender tone, gray.
- The global authority on consumer and design trends, WGSN x Colouro, colour picks for the Fall/Winter 2024-25 season include Intense Rust, Midnight Plum, Apricot Crush, Sustained Grey, and Cool Matcha, as well as silver to gold, metallic, and shiny tones (Swatch On Inc, 2023).

## - Fabric Trends

Global fashion trends for 2024 and 2025 reflect industry and societal dynamics, as well as brand strategies influenced by evolving consumer behavior. Both 2024 and 2025 include many different types of materials, the most important of which are:

- Light and malleable fabrics like silk, chiffon, satin, and subtle sheen satin and openwork materials (Swatch On Inc, 2024).
- Denim and upcycled denim jeans and untouched tailored pieces like crisp button-downs and wide blazers (Swatch On Inc, 2024).

- Lace, Linen, metallized fabrics, sheer mesh, ultra-fine knit for sheer top and luxurious materials (Swatch On Inc, 2024).
- Recycled polyester (cozy and fluffy but modest texture) and transparent vinyl PVC for all occasions (Swatch On Inc, 2023).
- Fall/Winter 2024/25: A wool jacquard paired with a quilted-ground abstract print. A spotted motif on three-layer scuba fabric combined with bio-based stretch polyamide ribbed jersey or a textured knit whose polyamide comes from the rubber of used tires, which belong to the new super technical sustainable materials, is also in traditional-structure piece-dyed suiting and monochromatic tweeds with fancy yarns (Swatch On Inc, 2024).
- Jacquard wool (Swatch On Inc, 2023) with unusual graphic motifs, botanical pattern prints and intricate embroidery, 3D-printed flowers of knit felt, macro-weave sporty tweed paired with memory-effect metallic weft denim. In knits, shiny chenille horizontal band patterns are alternating with transparencies, and the hot print engraving effects on velvet (Swatch On Inc, 2023).

### **-Sources of Inspiration**

The main fashion brands and designers in the 24/25 fall and winter shows are inspired by geological environments such as sandstone, soil, and gray rocks in nature, which have a plain, natural, stable, and high-quality neutral colour.

-Natural colours that lean towards neutral and closest to the colours of the earthy tones, dusty and tanned shade inspired by an arid landscape and blue of sky and water (Swatch On Inc, 2023).

- Romantic floral patterns inspired by nature, in addition to flowers and roses in innovative forms as: appliqués, adorning choker necklaces, and even as metallic accessories.

- Inspiration from South America, Southeast Asia, Russia, Brittany, and Sicily; the designer merges worlds to blend these together to tap into some kind of new cultural aesthetic (Swatch On Inc, 2023).

- Inspired by 90s fashion (Swatch On Inc, 2023).

- Metallized fabric, which was inspired from futurism and is influenced by the new, evolving world of the Metaverse.

-Summer is the most cited inspiration for designers, as designers were inspired by climate change and record temperatures, the idea of designs in which they used mesh fabrics, holes, lace, and other perforated techniques, as if the designer was

building a kind of air conditioning function into their clothes (Swatch On Inc, 2024).

### **- Clothing Pieces and their Composition**

-Practical separates and tailoring sets (Swatch On Inc, 2023).

- The workwear style draws inspiration from attire worn in workshops, factories, farms, and industries with its practicality, toughness, and comfort for demanding physical tasks (Topfashion, 2023).

-Flowy and drapery set-up (Swatch On Inc, 2023). Draping, commonly found in dresses, blouses, and skirts, involves the gentle folding of fabric to create elegant waves on the body through asymmetrical cuts, intricate clothing details, and stylish overlays (Topfashion, 2023).

- Cutouts, slashes, and shreds in asymmetric cuts.

- Short length dresses, skirts, shorts, and other pieces that originated in the 60s (Bakshi, 2023).

- Attention was given to the female form through shortened skirts; clean lines to outline the body; fitted maxi dresses; liquid gowns that represent the delicacy and flexibility of the interior; and plunging necklines (Topfashion, 2023).

- Engineer style jackets and shirts inspired by workwear. This gave rise to iconic pieces like overalls, work jackets, loose-fitting pants, flannel shirts, work boots, and aprons, often crafted from sturdy fabrics like denim and canvas and marked by simplicity, functionality, and durability with reinforced seams, utilitarian pockets, and an unpretentious design (Topfashion, 2023).


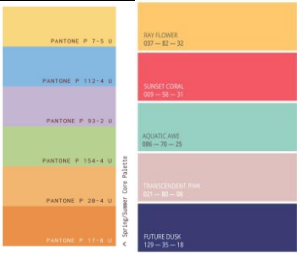

- Oversized cargo pockets for added utility (Topfashion, 2023).

- Monochromatic ensembles (Topfashion, 2023).

- Dresses over pants, double belts, racing jackets, long shorts, and denim on denim (Bakshi, 2023).

- Sporty wide-leg pants, tied ankle pants, floor-length wide-leg pants, straight cargo pants, slim flared pants, and tapered pants with a sense of volume (Topfashion, 2023).

**Table 1. Pantone colours for 2024-2025 expected from colour forecasting agencies**

Colour summer /spring 2024 Markus, O. (2023)	Colour summer/spring 2025 Topfashion. (2023)	Colour Autumn/ Winter 2024/25 Markus, O. (2023)
		

**Table 2. Fashion trends spotted during 2024 /2025 Fashion Week**

<p><b>Design from Bottega Veneta, Louis Vuitton, Chanel via GoRunway- Spring/Summer 2024 (Swatch On Inc, 2023)</b></p> 	<p><b>Design from Stella McCartney, Dolce &amp; Gabbana, Balmain via GoRunway- Spring/Summer 2024 (Swatch On Inc, 2023)</b></p> 
<p><b>Design from Dior, Diesel, MiuMiu via GoRunway Spring/Summer 2024 (Swatch On Inc, 2023)</b></p> 	<p><b>Design from Chloé, Balmain, Valentino via GoRunway Spring/Summer 2024 (Swatch On Inc, 2023)</b></p> 
<p><b>Design from runway Alberta Ferretti SS2024 (Swatch On Inc, 2023)</b></p> 	<p><b>Design from David Koma and Alexander McQueen-SS2025 (Swatch On Inc, 2023)</b></p> 

<p><b>Ulla Johnson and Erdem collections SS 2024 (Swatch On Inc, 2023)</b></p>	<p><b>Tibi, Tory Burch, and Staud SS'24 runway shows (Swatch On Inc, 2023)</b></p>	<p><b>Jason Wu, Proenza Schouler, Staud; Spotlight Launchmetrics.R SS '24 (Swatch On Inc, 2024)</b></p>	<p><b>Ulla Johnson, Sandy Liang, Tory Burch; Spotlight Launchmetrics SS'24 (Swatch On Inc, 2023)</b></p>
			
<p><b>Design from Gestuz-Denim on Denim WF-2024 (Swatch On Inc, 2023)</b></p>	<p><b>Alexander McQueen, Lazyo of FW-2024-2025 (Swatch On Inc, 2024)</b></p>		<p><b>Rabanne, Alexander McQueen Spring/Summer 2024 (Swatch On Inc, 2024)</b></p>
			

<p><b>MiuMiu, Bogner- FW-2025 (Swatch On Inc, 2024)</b></p>	<p><b>LOUIS VUTTON, BURberry, LAVIN FW-2024-2025(Swatch On Inc, 2023)</b></p>	<p><b>Andersson Bell, Yohei Ohno-SS-2025 (Swatch On Inc, 2024)</b></p>
		



### 5.1.5.2. Conducting Interviews with Egyptian Entities Specialized in Clothing Production

**To verify this hypothesis, to what extent do Egyptian clothing companies keep pace with international fashion and apply global forecasting?**

The researcher did field visits to some local factories and production decision makers in ready-to-wear garment factories and companies to answer some questions about the extent of following international fashion lines and their procedures in providing appropriate products to the Egyptian market. The extent of their interest is to develop development plans for production that are in line with international fashion and suit the local market.

The opinions of 15 factories, companies, showrooms, and outlets selling ready-made clothing companies in the governorates of Cairo, Sharqia, and Alexandria, and some industrial cities, including 10<sup>th</sup> of Ramadan, Obour, and October, were interviewed. The survey was divided into four axes:

First: fashion sources inside the factory; second: the type of implemented designs, third: following international fashion trends, and fourth: following international fashion in colors and fabrics; the results are shown in Table 3.

**Table 3.**The results of the four axes resulting from the interview with (15) producers of companies and factories in Egypt.

Answers of producing companies and factories		No. of factories	Percentages
1- Fashion source	The factory has a fashion designer	-	%0
	Bringing and simulating clothing samples from foreign sources	9	%60

	<b>inside the factory</b>	Using the internet and some social networking sites	9	%60
		Fashion magazines, pre-production samples, and a proposed design are in demand in the market	3	%20
		Customer request (worksheet)	3	%20
		Study the market and collect data from sales	2	%13.33
2-	<b>The type of implemented designs</b>	Innovative and redesigned from global fashion	3	%20
		Basic and casual clothes	12	%80
3-	<b>Following international fashion trends</b>	To some extent	7	%46.66
		Does not follow international fashion	8	%53.33
4-	<b>Following international fashion in colours and fabrics</b>	Global colour alignment	2	%13.33
		To some extent follows global colours	3	%20
		Follows in accordance with sales and local market	10	%66.66

From the results of the interview with 15 producers of companies and factories inside Egypt, as shown in the previous table 3, it can be seen that:

There is a scarcity among companies and factories in the presence of fashion designers to analyze and follow fashion trends and apply them within production, while (9) factories depend on producing clothes from pieces of clothing that were brought and imitated from foreign markets such as China and Turkey, which is equivalent to a percentage of (60%), while (9) factories rely on websites and social media to obtain modern clothing designs, equivalent to a percentage of (60%), and (3) other companies rely in their designs on fashion magazines and previous clothing pieces that are frequently redesigned, Equivalent to (20%) of a total of 15 factories. Production is also carried out in three factories based on the customer's request (worksheet), which represents (20%) of the factories. While (2) factories rely on studying the market through sales at a rate of 13.33%. (8) factories do not follow international fashion trends (53.33%), while (7) factories follow international fashion trends, after modifying their designs to suit the demands of the local market (46.66%), and (2) factories follow fashion trends. in colours by (13.33%), while (3) factories depend on international colours in choosing colours, which is equivalent to (20%), but (10) factories follow colour trends in accordance with sales data, which is equivalent to (66.66%).

### 5.1.5.3. Identify the Behavior of Specialists and Consumers in Following Fashion and Purchasing Clothing Products

A questionnaire was built using Google forms to define the opinions of Egyptian specialists as well as consumers to identify: (a) their behavior in following fashion includes 16 items; and (b) their behavior in purchasing clothing products includes 16 items; with analysis of the results.

### 5.1.5.3. Validity and Reliability of the Egyptian Consumer Questionnaire

The Egyptian Consumer Questionnaire was designed; to ensure its validity and reliability, another questionnaire, which includes 4 items, was presented to a number of (13) specialists in the field of clothing and textiles who are faculty members in various colleges affiliated with Egyptian universities.

#### A. Validity Calculation

To calculate the validity of the internal consistency of a questionnaire to evaluate the opinion of specialists in following fashion trends, it was applied to a survey sample, and after monitoring the results, it was processed statistically. The Pearson correlation coefficient was calculated between the axis and the total score of the questionnaire, and all of them were significant at the 0.01 level, which indicates the internal consistency of the questionnaire statements and allows the researcher to use it in the current research, as clear in Table 4.

**Table 4. Correlation coefficients for the axes of the questionnaire evaluating the opinion of specialists in following fashion trends**

Indicator	Correlation coefficient	indication
Fashionable behavior	.856**	.000
The behavior of the specialist in purchasing clothing products	.857**	.000

\*\* Significant at level (0.01)

It is clear from the table that the correlation coefficients are all at the level of (0.01), as the correlation coefficient values are close to the correct one.



## B. Reliability

Reliability coefficients were calculated for the questionnaire to evaluate the opinion of specialists in following fashion trends using the Alpha Cronbach method and split-half for the axes and the questionnaire as a whole; see Table 5. Shows the reliability values for the three methods (AL-Jundi, 2014).

**Table 5. Reliability coefficients for the axes of the questionnaire evaluating the opinion of specialists in following fashion trends**

Practices	Number of phrases	Alpha coefficient	Half retail	
			Spearman's coefficient	Guttman coefficient
Fashionable behavior	17	.861**	.866**	.904**
The behavior of the specialist in purchasing clothing products	17	.853**	.850**	.915**

\*\* Significant at level (0.01)

It is clear from Table 5. that the values of the reliability coefficients (alpha \_split-half, which includes the Spearman coefficient and the Guttman coefficient) for the dimensions and the questionnaire (as a whole) are significant at the level of (0.01), which confirms the stability of the questionnaire for evaluating the opinion of specialists in following fashion trends, the accuracy of its measurement, and the consistency of its statements, which dictate its suitability for application in the current study.

### 5.1.5.3.2. Egyptian Consumer Questionnaire

An electronic questionnaire was prepared using “Google Form” in a multiple-choice style, directed to a random sample of Egyptian consumers 368 consumers, includes two main axes to measure the first axe Egyptian consumer behavior in following international fashion trends and includes 16 items, and the second axe: consumer behavior in purchasing clothing products and includes (16) items. The result of analyzing the questionnaire statistically using the “SPSS program, Virgin 21” (AL-Jundy, 2014) was represented in answering the hypotheses as follows:

#### Discussing Hypotheses

**Does the degree of consumer acceptance of following fashion trends and purchasing clothing products vary depending on the variable (gender, job, level of education, age group)?**

**First: Type: The hypothesis has been verified**

There is a statistically significant difference at the level ( $\alpha \leq 0.05$ ) between the average degree of consumer acceptance of following fashion trends and purchasing clothing products, depending on the variable (type).

To test the validity of this hypothesis, a T-test for two unrelated means was calculated to compare the degree of consumer acceptance of following fashion trends and in purchasing clothing products according to the gender variable (male or female). The following Table 6 summarizes these results (AL-Jundi, 2014).

Means and standard deviations were calculated for the degree of consumer acceptance in following fashion trends and in purchasing clothing products depending on the variable (type) as shown in the following Table 6.

**Table 6. Means and standard deviations for the degree of consumer acceptance of following fashion trends and purchasing clothing products according to the variable (type)**

The hub	Type	the number	Average	standard deviation	Degree of freedom	"T" value	indication
Consumer behavior in following fashion trend	male	42	35.29	5.46	366	.727	.468
	female	326	34.67	5.17			
Consumer behavior in purchasing clothing products	male	42	35.02	6.19	366	.472	.637
	female	326	34.55	6.08			
(As a whole)	male	42	70.31	11.41	366	.599	.549
	female	326	69.22	11.07			

It is clear from the previous table:

- There is no statistically significant difference between the degrees of acceptance of consumer behavior in the following fashion depending on the variable (type), as the value of "T" was (0.727), which is a value that is not statistically significant at a degree of freedom (366).
- There is no statistically significant difference between the degree of acceptance of consumer behavior in purchasing clothing products depending on the variable (type), as the value of "T" was (0.472), which is a value that is not statistically significant at a degree of freedom (366).
- There is no statistically significant difference between the degree of acceptance of consumer behavior in following fashion (as a whole) depending on the variable (type), as the value of "T" was (0.599), which is a value that is not statistically significant at a degree of freedom (366).

## Discussing the Hypothesis

The hypothesis was rejected, it states: There is a statistically significant difference at the level ( $\alpha \leq 0.05$ ) between the average degree of acceptance of consumer behavior in following fashion and in purchasing clothing products, depending on the variable (type). The alternative hypothesis is accepted, it states: There is no statistically significant difference at the level ( $\alpha \leq 0.05$ ) between the average degree of consumer acceptance in following fashion trends and in purchasing clothing products depending on the variable (type).

## Second: Job: The hypothesis has been verified

There is a statistically significant difference at the level ( $\alpha \leq 0.05$ ) between the average degree of consumer acceptance of following fashion trends and purchasing clothing products depending on the variable (job).

To test the validity of this hypothesis, a t-test for two unrelated means was calculated to compare the degree of consumer acceptance of following fashion trends and purchasing clothing products according to the job variable (works, does not work). The following Table 7. Summarizes these results (AL-Jundi, 2014). Means and standard deviations were calculated for the degree of consumer acceptance in the following fashion trends and in purchasing clothing products depending on the function variable (works, does not work), as shown in the following Table 7.

**Table 7. Means and standard deviations for the degree of acceptance of consumer behavior in following fashion and in purchasing clothing products depending on the job variable (works, does not work)**

The hub	Function	The number	Average	standard deviation	Degree of freedom	t" value"	indication
Consumer behavior in following fashion trend	Working	196	35.35	5.39	366	2.127 *	.034
	do not work	172	34.20	4.98			
Consumer behavior in purchasing clothing products	Working	196	35.31	6.43	366	2.100 *	.036
	do not work	172	33.98	5.71			
(As a whole)	Working	196	70.66	11.67	366	2.148 *	.032
	do not work	172	68.18	10.47			

\*Job at level (0.05)

It is clear from the previous table:

- There is a statistically significant difference between the degrees of acceptance of consumer behavior in the following fashion depending on the variable (job) – in favor of (work), as the value of “T” reached (2.127), which is a statistically significant value at a degree of freedom of 366.
- There is a statistically significant difference between the degrees of acceptance of consumer behavior in purchasing clothing products depending on the variable (job) – in favor of (work), where the value of “T” reached (2.100), which is a statistically significant value at a degree of freedom of 366.
- There is a statistically significant difference between the degrees of acceptance of consumer behavior in following fashion (as a whole) depending on the variable (job) – in favor of (work), where the “T” value reached (2.148), which is a statistically significant value at a degree of freedom of 366.

### Discussing the Hypothesis:

The hypothesis was accepted, it states: There is a statistically significant difference at the level ( $\alpha \leq 0.05$ ) between the average degree of acceptance of consumer behavior in the following fashion and purchasing clothing products depending on the variable (job) – in favor of (work).

### Third: Level of education: The hypothesis has been verified

Means and standard deviations were calculated for the degree of consumer acceptance of following fashion trends and purchasing clothing products, varying by variable (level of education), as shown in the following Table 8.

**Table 8. Means and standard deviations for the degree of acceptance of consumer behavior in following fashion and in purchasing clothing products according to variable differences. Variable (level of education)**

The hub	education level	The number	Average	standard deviation
Consumer behavior in following fashion trend	secondary	18	35.16	5.20
	University	214	36.11	5.83
	Postgraduate	136	33.89	5.03
Consumer behavior in purchasing clothing products	secondary	18	35.11	6.20
	University	214	36.00	6.15
	Postgraduate	136	33.63	5.80
(As a whole)	secondary	18	70.27	11.25
	University	214	72.11	11.79
	Postgraduate	136	67.52	10.59

To verify the validity of this hypothesis, the researcher used the “One-Way ANOVA” method to determine the significance of the differences, as shown in the following Table 9:

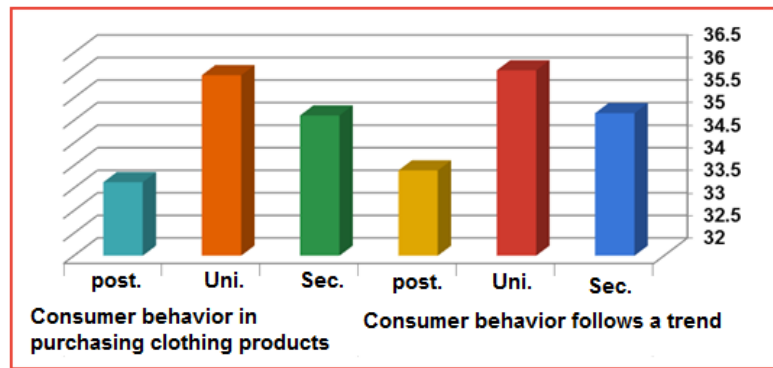
**Table 9. One-way analysis of variance for the differences between the degree of consumer acceptance in the following fashion trends and purchasing clothing products according to a variable (level of education)**

Consumer behavior	Source of variance	Sum of squares	Degrees of freedom	Mean squares	Value (q)	Significance level
Consumer behavior in following fashion trend	Between groups	169.711	2	84.855	3.175 *	.043
	Within groups	9753.721	365	26.723		
	Total	9923.432	367			
Consumer behavior in purchasing clothing products	Between groups	217.721	2	108.861	2.969 *	.053
	Within groups	13382.146	365	36.663		
	Total	13599.867	367			
(As a whole)	Between groups	771.329	2	385.665	3.167 *	.043
	Within groups	44453.529	365	121.790		
	Total	45224.859	367			

\*Significance at level (0.05)

From Table 9, it is clear that:

- 1- There is a statistically significant difference at the level ( $\alpha \leq 0.05$ ) between the average degrees of consumer acceptance of following the fashion trend according to the variable (level of education) in favor of universities, where the value of (F) was a statistically significant value.
- 2- There is a statistically significant difference at the level ( $\alpha \leq 0.05$ ) between the average degrees of acceptance of consumer behavior in purchasing clothing products according to the variable (level of education) in favor of university students, where the value of (F) was a statistically significant value.
- 3- There is a statistically significant difference at the level ( $\alpha \leq 0.05$ ) between the average degree of consumer acceptance of following fashion trends and in purchasing clothing products (as a whole) according to the variable (level of education) in favor of university students, where the value of (F) was a statistically significant value.



**Fig. 1. Averages for the degree of consumer acceptance of following fashion trends and purchasing clothing products according to the variable (level of education)**

As shown in Fig. 1. It can be said that the university students are the most fashion-following trends as well as purchasing clothing products, followed by postgraduate

This result is consistent with (Talaat R. M, 2022, pp.132-154) whose study indicates that Egyptian university students interested in fashion will have a higher level of participation in fashion.

#### **Fourth: Age Group: The hypothesis has been verified**

Means and standard deviations were calculated for the degree of consumer acceptance of following fashion trends and purchasing clothing products, with variable differences depending on the variable (age group), as shown in the following Table 10.

**Table 10. Means and standard deviations for the degree of consumer acceptance in following fashion trends and in purchasing clothing products, according to a variable (age group)**

The hub	Age group	The number	Average	standard deviation
Consumer behavior in following fashion trend	From18-25years old	145	35.63	5.50
	From26-32years old	64	34.11	4.91
	From33-40years old	81	33.83	5.04
	From41years and above	78	34.54	4.83
Consumer behavior in purchasing clothing products	From18-25years old	145	35.69	6.55
	From26-32years old	64	33.25	5.16
	From33-40years old	81	33.63	6.05
	From41 years and above	78	34.72	5.63
(As a whole)	From18-25years old	145	71.32	11.91
	From26-32years old	64	67.36	9.96
	From33-40years old	81	67.46	10.94

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From 41 years and above      78      69.26      10.12

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To verify the validity of this hypothesis, the researcher used the “One-Way ANOVA” method to determine the significance of the differences, as shown in the following Table 11:

**Table 11. One-way analysis of variance for the differences between the degree of consumer acceptance of following fashion trends and purchasing clothing products, with a variable-by-variable difference (age group)**

Consumer behavior	Source of variance	Sum of squares	Degrees of freedom	Mean squares	value (q)	Significance level
Consumer behavior in following fashion trend	Between groups	210.343	3	70.114	2.628*	.040
	Within groups	9713.089	364	26.684		
	Total	9923.432	367			
Consumer behavior in purchasing clothing products	Between groups	366.149	3	122.050	3.357**	.019
	Within groups	13233.718	364	36.356		
	Total	13599.867	367			
(As a whole)	Between groups	1105.747	3	368.582	3.041*	.029
	Within groups	44119.112	364	121.206		
	Total	45224.859	367			

From the analysis of Table 11, it is clear that:

- 1- There is a statistically significant difference at the level ( $\alpha \leq 0.05$ ) between the average degrees of consumer acceptance of the following fashion trends depending on the variable (age group) – in favor of those age 18 – 25 years, where the value of (F) was a statistically significant value.
- 2- There is a statistically significant difference at the level ( $\alpha \leq 0.05$ ) between the average degrees of acceptance of consumer behavior in purchasing clothing products depending on the variable (age group) – in favor of those from 18 to 25 years old, where the value of (F) was a statistically significant value.
- 3- There is a statistically significant difference at the level ( $\alpha \leq 0.05$ ) between the average degree of consumer acceptance of following fashion trends and purchasing clothing products as a whole depending on the variable (age group) in favor of those from 18 – 25 years, where the value of (F) was statistically significant.

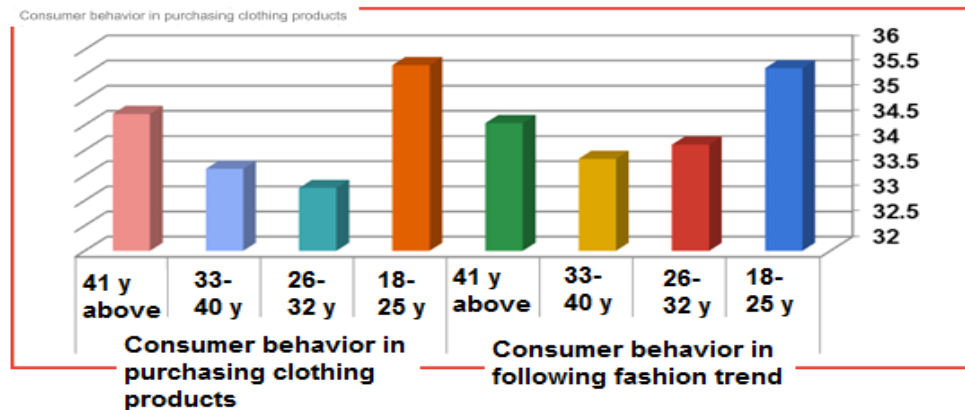


Fig. 2. Averages for the degree of consumer acceptance of following fashion trends and purchasing clothing products according to the variable (age group)

As clear from Fig 2. It can be said that the age range (18- 25) is the most fashion-following trends as well as purchasing clothing products, followed by the range of 41 and more, and the least one is the age between 26 to 40.

This result is consistent with (Nguyetkieuthu, 2023), whose study indicates that generation Z (aged between 12 and 25), the first digital generation, is known for their bold and courageous approach to fashion. They embrace expressing themselves through clothing, and their dressing style shows their individuality and desire to stand out from the crowd.

### What is the degree of acceptability of the behavior of the specialist in following fashion and in purchasing clothing products?

The study showed the significance of the differences between frequencies, percentages, and relative weight to the degree of acceptance of the behavior of the specialist in following fashion and in purchasing clothing products table 12.

The study sample consisted of 13 specialists in the field of clothing and fashion design to identify their behavior of following fashion trends and purchasing clothing products.

Table 12. Frequencies, percentages, and degree of acceptance of the specialist in following the fashion trend and his purchasing behavior for clothing products

The behavior	I totally agree		I agree to some extent		I do not agree		Favor	Average	Relative weight
	K	%	K	%	K	%			
The behavior of the specialist in following fashion	4	30.77	6	46.15	3	23.08	To some extent	2.08	69.23
The behavior of the specialist in purchasing clothing products	6	46.15	5	38.46	2	15.38	I totally agree	2.31	76.92



(As a whole)	5	38.46	6	46.15	2	15.38	To some extent	2.23	74.36
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The results of Table 12 Indicate:

The degree of acceptance of the specialist's behavior in the following fashion: The average of the items ranged from (2.08) to (2.31), with a relative weight ranging from (69.23) to (76.92). It is clear from this that a number of specialists' answers tended to somewhat agree at a rate of 69%. While the percentage of specialists whose answers tended to strongly agree with the questionnaire items was (76.92%), based on the above, it can be said that the degree of acceptance of the specialist in following fashion trends and in purchasing clothing products reaches (74.36%).



Fig. 3. The relative weight of the degree of acceptance of the specialist in following fashion trends and in purchasing clothing products.

**What is the degree of acceptance of consumer behavior in following fashion and in purchasing clothing products?**

To verify this hypothesis, the significance of the differences between frequencies, percentages, and relative weight to the degree of consumer acceptance in following fashion trends and in purchasing clothing products was calculated as shown in Table 13.

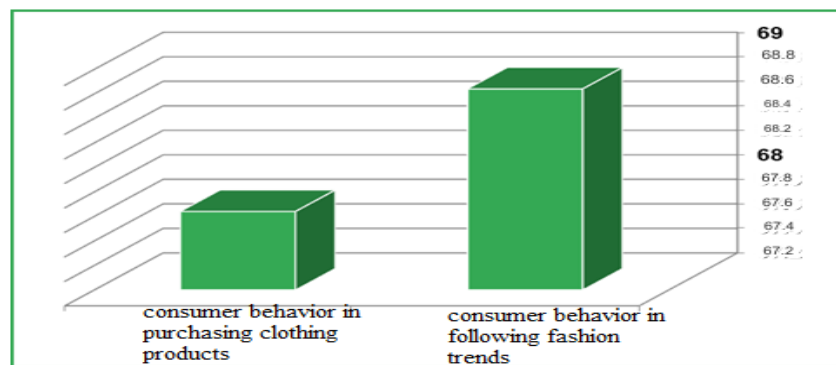
The study sample consisted of 368 consumers in different age groups to identify their behavior in following fashion trends and purchasing clothing products.

**Table 13. Frequencies, percentages, and degree of consumer behavior of following fashion trends and purchasing behavior for clothing products**

The behavior	I totally agree		I agree to some extent		I do not agree		Favor	Average	Relative weight
	K	%	K	%	K	%			
The behavior of the consumer in following fashion	126	34.24	140	38.04	102	27.72	I agree to some extent	2.07	68.84
Consumer behavior in purchasing clothing products	121	32.88	139	37.77	108	29.35	I agree to some extent	2.04	67.84
(As a whole)	123	33.42	140	38.04	105	28.53	I agree to some extent	2.05	68.30

The results of the previous table 13, indicate:

The degree of acceptance of consumer behavior in the following fashion trends: The average of the items ranged from (2.04) to (2.07) with a relative weight ranging from (67.84) to (68.84). It is clear from this that the number of consumers whose answers tended to somewhat agree with a percentage of (67.84%). Based on the above, it can be said that the degree of consumer acceptance of following fashion trends and purchasing clothing products reaches (68.30%).



**Fig. 4. The relative weight of the degree of acceptance of consumer behavior of the following fashion and purchasing clothing products**

***Is there a correlation between the behavior of the specialist and the consumer in the following fashion and purchasing clothing products?***

To verify this hypothesis, the researcher used the Person correlation coefficient of raw scores between the variables, as shown in Table 14.

**Table 14. Matrix of correlation coefficients between the behavior of the specialist and the consumer in following fashion and purchasing clothing products.**

	The behavior of the specialist in following fashion	The behavior of the specialist in purchasing clothing products	The behavior of the consumer in following fashion	The behavior of the consumer in purchasing clothing products
The behavior of the specialist in following fashion		0.906**	0.875**	0.785**
The behavior of the specialist in purchasing clothing products			0.678**	0.764**
The behavior of the consumer in following fashion				0.760**
The behavior of the consumer in purchasing clothing products				

Function level at 0.01\*\*

From Table 14, it is clear that:

- There is a statistically significant “direct correlation” between the behavior of the specialist in following fashion and the behavior of the specialist in purchasing clothing products (where the value of “R” reached its statistical significance at the level of (0.01).
- There is a statistically significant “direct correlation” between the behavior of the specialist in following fashion and the behavior of the consumer in following fashion (where the value of “R” reached its statistical significance at the level of (0.01).
- There is a statistically significant “direct correlation” between the behavior of the specialist in following fashion and the behavior of the consumer in purchasing clothing products (where the value of “R” reached its statistical significance at the level of (0.01).
- There is a statistically significant “direct correlation” between the behavior of the specialist in purchasing clothing products and the behavior of the consumer in following fashion (where the value of “R” reached its statistical significance at the level of (0.01).
- There is a statistically significant “direct correlation” between the behavior of the specialist in purchasing clothing products and the behavior of the consumer in purchasing clothing products (where the value of “R” reached its statistical significance at the level of (0.01).
- There is a statistically significant “direct correlation” between the behavior of the consumer in following fashion and the behavior of the consumer in purchasing clothing products (where the value of “R” reached its statistical significance at the level of (0.01).



Therefore, the researcher can accept the hypothesis that states: There is a statistically significant correlation between the behavior of the specialist and consumer in following fashion and in purchasing clothing products, and this result can be explained by the specialists and consumers are brought together by the influence of values, principles, identity, and society of Egypt, which clearly affects their behaviors and decisions to follow fashion and purchase clothes (2).

### 5.1.5.4 Suggesting Ideas for Remodeling or Redesign as Results of the Analysis

**To what extent have the proposed clothing designs been successful, according to the opinion of specialists in the field of clothing and textiles?**

To verify this hypothesis, the researcher suggested fashion clothing designs taken from international fashion trends and modified to suit the Egyptian market. Several photos of different global fashion designs for current seasons 2024 and 2025 were collected and redesigned by the researcher to meet the local Egyptian market using the *CLO 3D 7.3.197 fashion design software program*. After that, a questionnaire was built using Google forms consists of 10 statement to define the opinions of specialists in the field of clothing and textiles (22 specialists) and determine the success of the proposed designs that have been redesigned for international fashion.

#### Design NO.1: Original model & proposed design for fall/winter 2024-2025

Original model shape The ROW— FW2024-2025	The form of the proposed model after modification (redesign by the researcher)	Model analysis
 <p>Original model shape</p>	 <p>Model after modification</p> <p>Colour plan</p>	<p><b>Design:</b> Belted one-piece blouse</p> <p><b>Structural design:</b> A long, asymmetrical blouse with an uneven hemline that resembles a short dress above the knee with a three-dimensional style.</p> <p>A horizontal cut on the front and back above the chest makes the blouse appear to be made up of two pieces: a denim shirt with long sleeves that expand at the hemline with a zippered opening at the mid-sleeve line, a stand-up collar, and a front opening with buttons, and the other piece looks like a strapless fit and flare dress. The blouse is decorated with two leather belts around the waist.</p> <p><b>Material:</b> Tweed with denim</p>

	<b>Colors:</b> Dark indigo, Camel
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Fig. 6. Proposal design for fall/winter 2024-2025

**Design NO.2: Original model & proposed design for summer /fall 2024-2025**



Original model shape The ROW—SS-2024-2025	The form of the proposed model after modification (redesign by the researcher)	Model analysis
 <p>Original model shape</p>	 <p>Model after modification</p> <p style="text-align: right;">colour plan</p>	<p><b>Design:</b> Overall jumpsuit and blouse</p> <p><b>Structural design:</b> A slim-fitting, one-piece jumpsuit that covers the legs, has two straps that are attached to a metal cylinder, a princess cut at the third portion of the bodice till the cut line across the asymmetrical horizontal cut across the abdomen. Asymmetrical pants with a box pleat on the right leg. Two belt-like incisions fashioned from faux leather material; the first belts around the abdomen line and the second, around the left thigh, are decoratively attached to one another. The blouse has long sleeves with cuffs, a shirt collar, and buttons.</p> <p><b>Material:</b> Gabardine, faux leather, cotton, or cotton blend.</p> <p><b>Colors:</b> Dark indigo jeans, brown leather, cotton skin colour.</p>

Fig. 7. Proposed design for summer /fall 2024-2025

**Design NO. 3: Original model & proposed design for summer/fall 2024-2025**



Original model shape-ss-2024	The form of the proposed model after modification (redesign by the researcher)	Model analysis
 <p>Original model shape</p>	 <p>Model after modification</p> <p style="text-align: right;">colour plan</p>	<p><b>Design:</b> cardigan, blouse, trousers</p> <p><b>Structural design:</b> long cardigan with an overlapping neck opening, a shirt with a standing collar with irregular edges, and long wide sleeves that gather at the wrist. Fitted jeans pants with a slanted cut above the knee.</p> <p><b>Material:</b> Striped cotton blend for cardigan, plain cotton for shirt and plain jeans for pants</p> <p><b>Colors:</b> Dark indigo, white, multi- coloured striped.</p>

Fig. 8. Design proposal design for summer/fall 2024-2025

**Design NO.4: Original model & proposed design for fall/winter 2024**



Original model shape-FW2024	The form of the proposed model after modification (redesign by the researcher)	Model analysis
 <p>Original model shape</p>	 <p>Model after modification</p> <p>colour plan</p>	<p><b>Design:</b> coat, dress, trousers</p> <p><b>Structural design:</b> A-line knee coat with a shawl collar, symmetrically cut from the shoulder line slanted to the center front line, closed with a metal attachment; wide-fitting sleeves to the elbow line followed by a puffy cut, with an elastic band fastening the wrist line. A blouse with an open neck and a crisscross front cut to the midline, a cut from the midline to the hemline in the form of a knee-length dress, and pants that fit the body.</p> <p><b>Material:</b> plain cotton blouse, gabardine pants, textured tweed fabric for the coat.</p> <p><b>Colors:</b> plain camel, earthy brown, chocolate brown, camel</p>

Fig 9. Proposal Design for fall/winter 2024-2025

**Design NO.5: Original model & proposed design for summer/spring 2024-2025**



Original model shape-ss2024	The form of the proposed model after modification (redesign by the researcher)	Model analysis
 <p>Original model shape</p>	 <p>Model after modification</p> <p>colour plan</p>	<p><b>Design:</b> Bolero jacket, dress, leggings pants.</p> <p><b>Structural design:</b> A bolero jacket with an asymmetrical front cut flat collar, one lapel with defined edges with an external stripe and fitting long sleeves. A knee-length dress with spaghetti straps with a sweetheart neckline which begins with a fitted bodice, tapers at the waist, then flows semi-freely to the knee, with an external layer on one side, defined by an external eyelet tape, fastened with a button on the waistline.</p> <p><b>Material:</b> plain gabardine for bolero, light-weight fabric with lycra for pants and blended fabric for dress.</p> <p><b>Colors:</b> forest green, mustard</p>

Fig 10. Proposed design for summer/spring 2024-2025

**Design NO.6: Original model & proposed design for summer/fall 2024-2025**



Original model shape-ss2024	The form of the proposed model after modification (redesign by the researcher)	Model analysis
 <p>Original model shape</p>	 <p>Model after modification</p> <p>colour plan</p>	<p><b>Design:</b> Shirt dress, pants</p> <p><b>Structural design:</b> Shirt collar dress with short buttons opening and full sleeves with cuffs; reaches the knee line with a side slit to the buttocks line. The edges are defined by bias bound, embellished with a piece that resembles a half-shirt with free ends containing a sleeve, a stand collar and a front opening with buttons fastened diagonally from the shoulder line to the opposite side. Trousers with inverted cuffs on the leg opening.</p> <p><b>Material:</b> plain cotton shirt, printed cotton blend added shirt, plain Lycra pants</p> <p><b>Colors:</b> striped print, navy, charcoal grey</p>

Fig. 11. Proposed design for summer/fall 2024-2025

**Design NO.7: Original model & proposed design for fall/winter 2024-2025**



Original model shape-fw2024	The form of the proposed model after modification (redesign by the researcher)	Model analysis
 <p>Original model shape</p>	 <p>Model after modification</p> <p>colour plan</p>	<p><b>Design:</b> crop top, dress with belt, trousers</p> <p><b>Structural design:</b> The ensemble consists of a crop top with a standing collar, open rectangular cuts, and full-length sleeves that are divided into two parts and only partially connected at the elbow; it also includes a mini dress with decorative fringes at the waist, a leather belt, and regular-fit pants with an irregular hemline created by a rectangular cut.</p> <p><b>Material:</b> Cotton Lycra crop top, lace for the upper part of the dress, plain cotton Lycra, light weight gabardine.</p> <p><b>Colors:</b> chocolate brown, white, beige.</p>

Fig 12. Proposed design for fall/winter 2024-2025

**Design NO.8: Original model & proposed design for fall/winter 2024**




Original model shape-fw2024	The form of the proposed model after modification (redesign by the researcher)	Model analysis
 <p>Original model</p>	 <p>Model after modification</p>  <p>colour plan</p>	<p>Design: An ensemble (under shirt, bolero jacket, skirt).</p> <p>Structural design: An under shirt with sleeves; a godet skirt under knee length, embellished with round metal pieces and an inner lining with different shade colour revealed when opening the godet with zippers extended from the waistline to the hem line. The bolero has an open, curving center front line, a cut at the shoulder line, and is fastened with a belt at the waist with a buckle. It also has broad sleeves with inverted cuffs that are locked in place, big pockets, and straps that are fastened on the shoulders and scay line.</p> <p>Material: Fabric like suede Colors: forest green</p>

Fig. 13. Design proposal for fall/winter 2024-2025

**5.1.5.4.1 Specialist Questionnaire**

An electronic questionnaire using the “*Triple Licart Scale*” (totally agree- agree- do not agree) was built using a “Google Form”, to define the opinions of specialists in the field of clothing and textiles (22 specialists), including 10 statements to determine the degree of successful of the proposed designs that have been redesigned from international fashion. The analysis of the results is shown in Table 15.

Table 15. Results of calculating the relative weight for each question separately, the weighted average, and the percentage for each design

	S 1	S2	S3	S4	S5	S6	S7	S8	S9	S10	weighted average	Design %
D 1	2.54	2.63	2.54	2.59	2.54	2.36	2.50	2.40	2.50	2.45	2.50	83.33%
D 2	2.63	2.63	2.45	2.59	2.59	2.27	2.22	2.09	2.36	2.36	2.41	80.33%
D 3	2.72	2.81	2.77	2.77	2.81	2.72	2.86	2.77	2.86	2.81	2.79	93%
D 4	2.59	2.45	2.59	2.45	2.63	2.50	2.63	2.63	2.54	2.50	2.55	85%
D 5	2.68	2.63	2.27	2.50	2.40	2.18	2.27	2.18	2.40	2.27	2.37	79%
D 6	2.50	2.63	2.22	2.59	2.36	2.27	2.27	2.36	2.40	2.27	2.38	79.33%



D 7	2.50	2.45	2.18	2.45	2.45	2.13	2.27	2.22	2.22	2.27	2.31	77%
D 8	2.54	2.45	2.54	2.77	2.63	2.59	2.72	2.72	2.68	2.68	2.63	87.66%

D= design S= Statement

**Note: All Opinions are its weight (Weights), according to the order (totally agree= 3, agree= 2, do not agree= 1); after that, calculate the arithmetic mean (weighted average), then determine the importance degree:**

**Small degree (1- 1.66), Medium degree (1.67- 2.33) and High degree (2.34- 3)**

After analyzing the results of the questionnaire and after calculating the relative weight of each item of the questionnaire's ten statements, the relative average for each proposed design, and the percentage of success of each design, as shown in Table 15, the researcher reached the following results:

- All proposed designs were successful, as all designs obtained percentages higher than 75%.
- The third proposed design achieved first place with a score of 93%, followed by the eighth design with a score of 87.66%, then the fourth design with a score of 85%, and the seventh proposed design came in eighth and last place with a score of 77%. As shown in figure 4.
- The third proposed design achieved the **highest relative weight** in the ten questionnaire statements (**importance high degree**), as it succeeded in all aspects of design, colour, social acceptance, beauty, and suitability for purchase and use.
- The eight proposed designs succeeded in achieving a **high degree of importance (2.34- 3)** in the first statement in the form, which includes "The design is consistent with international fashion lines" the second statement in the form, which includes "The external appearance of the design is consistent with the lines of the original design" the fourth statement in the form, which includes "The colours used for the proposed design follow international fashion colours" and the fifth statement in the form, which includes "The proposed design is characterized by balance in the final design lines".
- Proposed designs No. 5, 6, and 7 achieved a **moderate degree of importance (2.67- 2.33)** in verifying statements No. 3, 6, 7, and 10, which include, in order: "The design is successful and has an acceptable appearance," "The design is suitable for wearing at different daily times," "The proposed design is appropriate for implementation in the Egyptian market," and "Refer friends to the brand that offers the suggested design,".

- The seventh design achieved last place, as it is the only design that achieved a relative average with a **moderate degree of importance (2.31)** for the design as a whole, although the design obtained a high degree of importance in fulfilling statements 1, 2, 4, and 5, and a medium degree of importance in fulfilling statements 3, 6, 7, 8, 9, and 10, where statements 8 and 9 include, in order: “The proposed design is compatible with the Egyptian consumer and our social values” and “the proposed design is characterized by the beauty of the final appearance.”

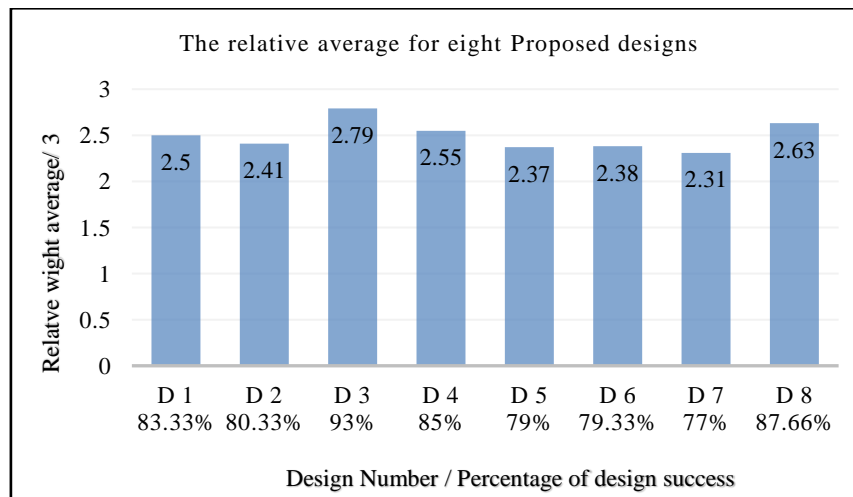


Fig. 4 The relative average and percentage of success of the eight proposed design

## 6. Conclusion

International fashion institutions set their trends in fashion design for each of the four seasons: summer, spring, fall, and winter. New fashion trends may emerge; and old fashions from previous years may be revived, such as the fashion of the sixties, seventies, or nineties of the last century. But do these institutions care about the identity, cultures, and desires of consumers in different societies in general? Do international fashion trends suit the desires of the Egyptian consumer and the requirements of the local market in particular?

In view of these factors, the current study developed a strategic action plan that may help clothing producers within the Arab Republic of Egypt and all those interested in the world of fashion, such as students, teachers, and professors in institutes and universities and designers specialized in the field of clothing and textiles, in addition to those working in the field of industry and production. They must have methods for studying and analyzing international fashion trends and link them to the requirements of the Egyptian market. From these methods:

encouraging followers of fashion and purchasing behavior to develop their own design ideas and trends in a way that suits Egyptian consumers, and methods for modifying and redesigning designs inspired by international fashion lines.

It is important to recognize the strategic issues that have emerged from the analysis so far because this helps to:

- Focus attention on the requirements of the local market without prejudice to international fashion.
- Identify the challenges facing clothing producers to ensure real sales and profits.
- Highlight the changes occurring in the general taste of the consumer that require change and development in the clothing industry
- Provide some ways on how to solve problems.

Data on global fashion trends was collected and analyzed, in addition to collecting data from specialists in the field of clothing and textiles, consumers, and some institutions based on clothing production in Egypt as a review of the literature for the strategic plan. The result of the analysis of the collected data consists of the following:

1-Trend forecasting agencies act as consultants to large companies; they base their information primarily on intuition as well as conduct market research surveys, such as: following fashion news through exhibitions, namely (colour trends exhibitions-textile trends), studying the consumer through questionnaires, developing an analytical plan for the structure of the formulation boards; studying social and economic trends and events on the scene in general that affect society due to cultural changes as well as transformations in lifestyle, analyzing seasonal trends, trying to explore the spirit of the times and combine cultural components that suit it.

2- Results of the interview with the institutions responsible for producing and selling clothing in the local market are that: they do not have fashion designers, and that in some institutions, the factory owner plays this role as a result of his sales statistics. In the majority of producing institutions, they rely on magazines, websites, samples collected from foreign markets such as China and Turkey, and sales percentages for previous products.

3- There is a statistically significant correlation between the behavior of the specialist and the consumer in following fashion and purchasing clothing products.

4- The consumer opinion questionnaire revealed that:

-The results showed that the percentage of female consumers follow new fashions only when they are acceptable 60.1%, and that female consumers are not interested in following the fashion trend as much as they care about the appropriateness of the clothes and how suitable they are for them 53%. Likewise, female consumers do not tend to follow fashion in clothing products. The difference in general taste was 65.2%, while the results showed an average interest among female consumers who are interested in clothing items with a new and different idea in design, with a percentage of 48.4%.

- The statistical analysis also resulted in an increase in the number of female consumers who tend to wear classic or casual clothing suitable for daily life more than occasion clothing by 67.6%. The increase was noticeable in female consumers following fashion that matches the wearer's personality by 87%.

- Consumers also choose clothing items that follow fashion trends and suit the economic situation 66%. The study also shows an average increase in female consumers following fashion through commercial stores over various means of communication to follow the latest fashion trends by 43.2%.

- Female consumers agreed to pay attention to clothing items that are consistent with Egyptian societal values and principles at a rate of 51.4%, the result of the survey also showed an increase in the number of female consumers searching for clothing items that are consistent with international fashion trends at a rate of 62.5%.

- The reading of female consumers' behavior in purchasing clothes that follow current fashions has got 45.5%. Most female consumers seek to plan their shopping for their clothing products carefully 54.5% and female consumers were more responsive to purchasing new, distinctive products 63.6%. They are also more likely to buy clothes with new ideas that fit together 72.7%.

The demand for purchasing clothing items from a famous brand was better than trying a new one, at a rate of 36.4%, while the demand for purchasing products of the same brand with distinctive ideas was high, at a rate of 54.5%.

- It also became clear that female consumers prefer to buy from a specific brand due to the quality of its products, warranty, and good after-sales service, at a rate of 45.5%.

- The concentration of female consumers in shopping for clothes at times of offers and events throughout the year was revealed at a rate of 36.3%.

Consumers are not greatly affected in their purchasing decisions according to the country of manufacture, and the percentage was 36.4%.

-The study also revealed that female consumers are interested in recommending a clothing brand to friends that they have tried, and that helps provide good information about it and where to shop at a rate of 72.7%.

4- **Strength elements** in following international fashion trends are: A. Opening a new field of innovation, diversity, and a sense of everything that is new and innovative, especially in the field of colors, materials, sources of inspiration, and new fashion lines and styles. B. Unite with other people all over the world. **Weak points:** A. Not all international fashion trends are compatible with the taste of the Egyptian consumer and therefore with the requirements of the market as a result of differences in identity, values, societal principles, beliefs, and general taste. B. The globalization of fashion trends helps to erase the cultures and identity of people, of which fashion is one of the most important means of expression.

-Strategic planning is an effective means of making decisions and agreeing on the procedures and stages that will shape and direct the fashion designer and the institutions specialized in the clothing industry, what they do, why they do it, and how they do it. Strategic planning can be done in many different ways, and many books, journals, research papers, and companies have been written describing the different methods.

-The innovative strategy will help each member or production organization to exchange ideas with others about its model for the design and redesign process program; it will help anyone interested in the field of production and design know how to analyze global fashion trends, analyze the requirements of the local market, and conclude the outputs and concept on which the design is made.

-The strength of the strategic plan is that it will help the designer brainstorm to find new and diverse ideas to follow international fashion trends in particular that suit the requirements of the Egyptian market, and to create new ideas in the field of design. The weakness of this type of redesign of international fashion designs is the distance from the cultural and historical heritage and sometimes the distance from the Egyptian identity, but sometimes it may be implicitly manifested, and that is only in some clothing pieces.

## **Recommendation**

Increasing the number of studies by specialists to follow up on consumer behavior in following fashion and the changes that may occur as a result of economic, psychological, societal, media, and other factors that may affect consumer behavior in following fashion and his purchasing behavior and thus

affect the quality of production, decisions of clothing producers, market requirements, profit rates, and increasing inventory.

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