

The behavioural changes of fashion consumers in a pandemic and post-pandemic scenario: understanding the changes related to shopping habits and digital attitudes due to lockdown measures

The fashion industry is going through numerous changes, mainly due to the technological advent of the last thirty years that has changed the way consumers interact with businesses and make their purchases. The COVID-19 pandemic has further disrupted this volatile market context, accelerating certain changes already underway, as well as permanently modifying the behavior of fashion consumers. The following research proposal aims to investigate the behavioural changes of fashion consumers caused by the health containment measures of the various national governments around the world, focusing the research on three behavioural aspects: purchase orientations, use of different marketing channels, and digital behaviors. In particular, this study will focus on two generational cohorts – generation X and Y – due to the more disruptive effects that continuous lockdowns have had on these two large groups of the population. In order to better investigate the behavioural aspects mentioned above, the methodology set out below includes the use of a mix of tools for data collection through questionnaires, semi-structured interviews in a controlled environment and field experiments.

1. State of the art

Over the past two decades, the retail scenario has radically changed. The cause is to be found both in technological progress and the increasingly widespread trend towards digitization. For example, in some industries online channels have become predominant over traditional ones. In this changed market context, companies try to react by changing their distribution channels, with the aim of making products available in the times, places and new ways desired by consumers, even beyond traditional national borders (Mason, Knights & Diegoli, 2019). Many of them have turned to multi-channel retailing strategies, offering customers a varied number of channels to make their purchases. This approach – which over time has become the

dominant one – at first did not have its roots in a careful planning strategy but, on the contrary, was driven by continuous, and often approximate, attempts to pursue the latest market developments (Zhang et al., 2010). More recently, however, the operational scope of the multi-channel strategy was significantly expanded, coming to consider issues such as the integration of the retail mix and customer management across channels. Thus, was born the first evolution of multi-channel retailing, which takes the name of cross-channel retailing.

In more recent times, we are witnessing a further evolution, directly supported by the spread of personal electronic devices and by the intensive use of social media in all sales contexts that takes the name of omni-channel retailing. This provides for a total convergence of the different marketing channels, providing the consumer with a perfectly integrated shopping experience (Lazaris & Vrechopoulos, 2014). In this context, the different channels are used by consumers in a perfectly interchangeable way, both during the search for information and in the purchase phase, making it virtually impossible for companies to control them. Another important development of the omnichannel approach is the integration of new interactive channels with traditional media (Verhoef, Kannan & Inman, 2015). Consequently, social media are considered a point of contact with the consumer in all aspects, as they not only facilitate the company's interaction with the potential customer but also the exchange of information between users themselves.

This latest approach has undergone a further acceleration following the international outbreak of novel SARS-CoV-2 coronavirus infection, which has made companies worldwide understand the importance of maintaining and continuously developing their distribution channels and points of contact with customers on the internet. In particular, many of these companies have had to face prolonged and intermittent lockdowns that have forced them to close their stores and move their promotion and sales activities online. At the same time, consumers have also been forced to use online channels exclusively to be able to make some of their purchases. This situation has inevitably led to a change in consumer behavior that will have a strong impact on the retail industry in the coming years (Roggeveen & Sethuraman, 2020). Some of these effects are already visible. For example, in the United Kingdom alone, in the year 2020 there was a record of closures equal to 17,532 units, and the situation according to analysts could worsen because of the uncertainty associated

with the behavioural factor of consumers (PwC, 2021). When the health emergency is over, will these go back to buy in stores, or will they continue to buy most of their goods through online channels? The answer to this question is of primary importance for the survival and future growth of all businesses.

2. Research Objective

Starting from the problem just outlined, the objective of the research wants to be placed on the analysis consumer's behavior. More precisely, I want to investigate how the behavior of fashion consumers has changed in recent years and following the pandemic in various countries worldwide. In fact, fashion retailers have been particularly hit by the crisis caused by COVID-19 outbreak, and industry executives estimate that around 10% of their stores will undergo a permanent closure by the end of 2021, mainly due to the massive move of in-stores sales towards online channels (McKinsey, 2020). In particular, there are three behavioural aspects that is important to deepen – purchase orientations, use of different marketing channels, and digital behaviours – within two specific generational cohorts: generation X and Y.

A purchase orientation is defined as the consumer's attitude towards the evaluation and acquisition of the product. In this sense, an orientation consists of a personal dimension – characterized by motivations, preferences and needs of individuals – and a purely behavioural dimension towards market agents (Workman & Cho, 2012). Consequently, people with different purchase orientations show different behaviors in many aspects, such as the nature of information sought and the choice of marketing channel. In detail, there are seven purchase orientations that most commonly occur in fashion consumers: fashion-consciousness, brand-consciousness, recreation, price, impulsivity, convenience, and quality (Yoo-Kyoung & Bailey, 2007). Before the COVID-19 outbreak, generation X was characterized by a particular focus on price. Individuals were very receptive to discount policies and hostile to moving outside their sphere of influence to make purchases. On the other hand, individuals belonging to generation Y, while sharing all the characteristics just mentioned for the generation X, were also united by a greater impulsiveness in the purchase intention, as well as a greater consideration for the brand (Pentecost & Andrews , 2010).

As for the use of marketing channels and digital behaviors, generation X preferred traditional channels to buy clothing, without excluding the use of online

stores for already known products, which were therefore associated with a high level of confidence. On the contrary, when dealing with unknown articles these individuals tended to use digital information channels – such as blogs and social networks – to research the most important characteristics. Then, this was followed by a visit to the nearest traditional shop, with the aim of refuting the correctness of the online information (Sullivan & Hyun, 2016). On the other hand, those belonging to generation Y had a much higher degree of technological competence. These individuals were regular users of major social media and were more inclined to experiment. Even the exponents of the generation Y usually searched the internet for information about the products they were interested in, with the difference that they often bought these items directly online without examining them in person. In fact, the prior search for information on the internet allowed for highly efficient purchasing decisions, choosing the best item, and concluding the transaction quickly (Sullivan & Hyun, 2016).

According to Pantano et al. (2020) individuals from these two cohorts are those who most suffered the effects of social distancing. Some of them are switching to online purchases, discovering the safety and benefits of home deliveries, store pick-up, and cashless payment, thus changing forever their shopping habits and buying behavior. As a result, many of the previously exposed purchase orientations, shopping habits and digital behaviors may no longer be valid in a post-pandemic context and deserve to be re-investigated.

3. Methodology

In order to investigate these changes regarding the behavioural aspects of fashion consumers, the methodology will combine a mix of questionnaires, field experiments and semi-structured interviews in a controlled environment. These data collection methods constitute the foundation of marketing research. In fact, surveys, individual interviews, and extrusive observation are just some of the approaches most used by both companies and academic institutions to conduct their own marketing studies (Kotler & Keller, 2012).

The questionnaires will be carried out both online and offline. In particular, those who shop online will receive the questionnaire directly on the e-mail address provided at the time of purchase, while individuals who buy in the store will be asked

to fill out a quick questionnaire immediately after checkout. In both cases the goal is to establish the reasons that push fashion consumers to choose one or the other marketing channel, trying to establish if there have been any substantial and definitive changes compared to the period prior to the pandemic outbreak .

At the same time, it would be useful to conduct semi-structured interviews in a controlled environment on a representative sample of individuals belonging to generations X and Y. The aim is to understand whether the purchase orientations, digital behaviors, and more generally the shopping habits of the respondents have undergone permanent modifications. For example, who, after the end of the health emergency, have resumed their usual shopping habits and how many have instead decided to keep part of their online purchases? How much has the importance of social media increased, and more generally of all sources of information online, in researching and purchasing the product? Have the motivations, preferences and needs of the individual, when buying clothing, remained the same?

Last but not least, it will be essential to carry out field experiments. The idea is to expose consumers within a store to certain promotional stimuli, in order to verify their real level of loyalty to the physical store. Are potential customers, exposed to certain promotional policies for online purchases directly in store, willing to abandon the idea of buying locally to take advantage of the online discount? The data collected within the points of sale, appropriately accompanied by further semi-structured interviews, will help to understand how these are actually still important in the eyes of fashion consumers to buy their clothes, i.e. how much it makes sense to continue organizing their layout on the basis of a purely transactional perspective. In fact, according to Alexander & Blazquez Cano (2020) in the last decade the traditional point of sale has been affected by important transformations that have shifted the focus on the internal organization towards an experiential level of immersion to the roots of the brand and probably this aspect, following changes brought about by the COVID-19 pandemic will take on even greater significance.

Once the data have been collected, for their analysis I intend to apply the fuzzy clustering technique, a particular form of clustering in which each data point can belong to one or more clusters. Conversely, in non-fuzzy clustering each observation strictly belongs to a single cluster (Kosko, 2002). For example, fashion consumers may decide to buy their clothes only in-store (non-fuzzy clustering), but they may also

decide to buy both in-store and online (fuzzy-clustering). In this way, a consumer, instead of belonging to either the group of individuals who rely on traditional marketing channels (in-store purchases = 1), or the group of those who prefer new digital channels (online purchases = 0), belongs to both clusters (in-store purchases = 0.5 ; online purchases = 0.5).

4. Expected Results

The gradual abandonment of traditional marketing channels, combined with the emergence of new consumer habits and digital behaviors, has meant that fashion industry has undergone major changes in the last two decades. However, it is clear that not all of them will survive the pandemic we are experiencing, at least not without some variation. With this research proposal I intend to shed light on these variations, investigating how the virus containment measures have influenced three behavioural aspects of fashion consumers: purchase orientations, use of different marketing channels, and digital behaviors.

It is reasonable to assume that most of individuals belonging to generation X, traditionally linked to their sphere of influence to make their purchases – in a physical store near their home or workplace – will decide to permanently maintain a part of their shopping routines online. The same can be said, perhaps to a greater extent, for those belonging to generation Y. At the same time, however, some purchase orientations, such as attention to the price, reputation of the brand or the impulsiveness associated with purchase decision, should tend to remain unchanged.

Therefore, we should see a progressive abandonment of traditional shops to embrace new and faster ways of buying. This does not necessarily mean the disappearance of physical stores but rather their numerical reduction and internal reorganization, with the aim of meeting the changing needs of consumers.

At the same time, the search for information on products on the internet – as well as the interactions of online users – for the first time since the birth of World Wide Web will affect groups of population that until now had escaped, at least in part, to a more pervasive use of technological innovations that instead characterized the life of the next generation – generation Z – since childhood.

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