



# A Brave New World

Understanding consumer sentiment during the pandemic



# IN THIS REPORT

## LOCKDOWN LESSONS

How our lives have changed and how fashion brands have responded in the face of the pandemic?



## UNDERSTANDING CONSUMER BEHAVIOUR & SENTIMENT POST-LOCKDOWN

Gauging consumer sentiment in a world post lockdown through an online survey with Indian consumers.



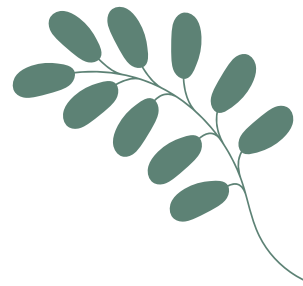
## PLANNING PAST THE LOCKDOWN

What are the key actions that brands can take and the learnings from China.



## THE APPROACH – INSIGHT & INFORMATION SOURCES

Use of the Meltwater tool for social listening to understand what people are saying as well as what brands are doing in these unusual times

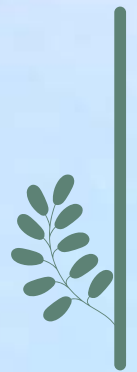


Use of audience insight tools and analytics to understand consumer behaviour and attitudes at different stages of the pandemic

Consumer survey with more than 440 LIVA consumers as respondents  
80% Female | 22 cities across India  
Age group: 18 – 55 yrs  
Conducted through: Social Media & Social Influencers



Use of google search trends and google reports to uncover the latest insights about today's consumers



# LOCKDOWN LESSONS





# AS THE PANDEMIC GRIPPED THE WORLD, SEARCH TRENDS SHOW HOW OUR LIVES HAD CHANGED

PEOPLE LEARNT TO LIVE, EXERCISE AND BE ENTERTAINED AT HOME



INDIA NOTED AN INCREASE IN PERSONAL HYGIENE MEASURES



MAJORITY SEARCHED FOR WHEN THINGS WOULD GO BACK TO NORMAL



**INDIANS RESPONDED WITH  
ACTIVE CONVERSATIONS AROUND  
STAYING HOME, SOCIAL DISTANCING AND PREVENTIVE MEASURES**



Total Mentions

**11.9M**

Compared to previous period

Mentions/Day Average

**32.5K**

Compared to previous period





# THERE ARE RISING CONCERNS ABOUT THE ECONOMY

INDIANS ARE CONCERNED ABOUT THE ECONOMY – FORCED LEAVES, FURLOUGHS AND A HIT ON FINANCIAL MARKETS

Total Mentions

**77K**

Compared to previous period

Mentions/Day Average

**846**

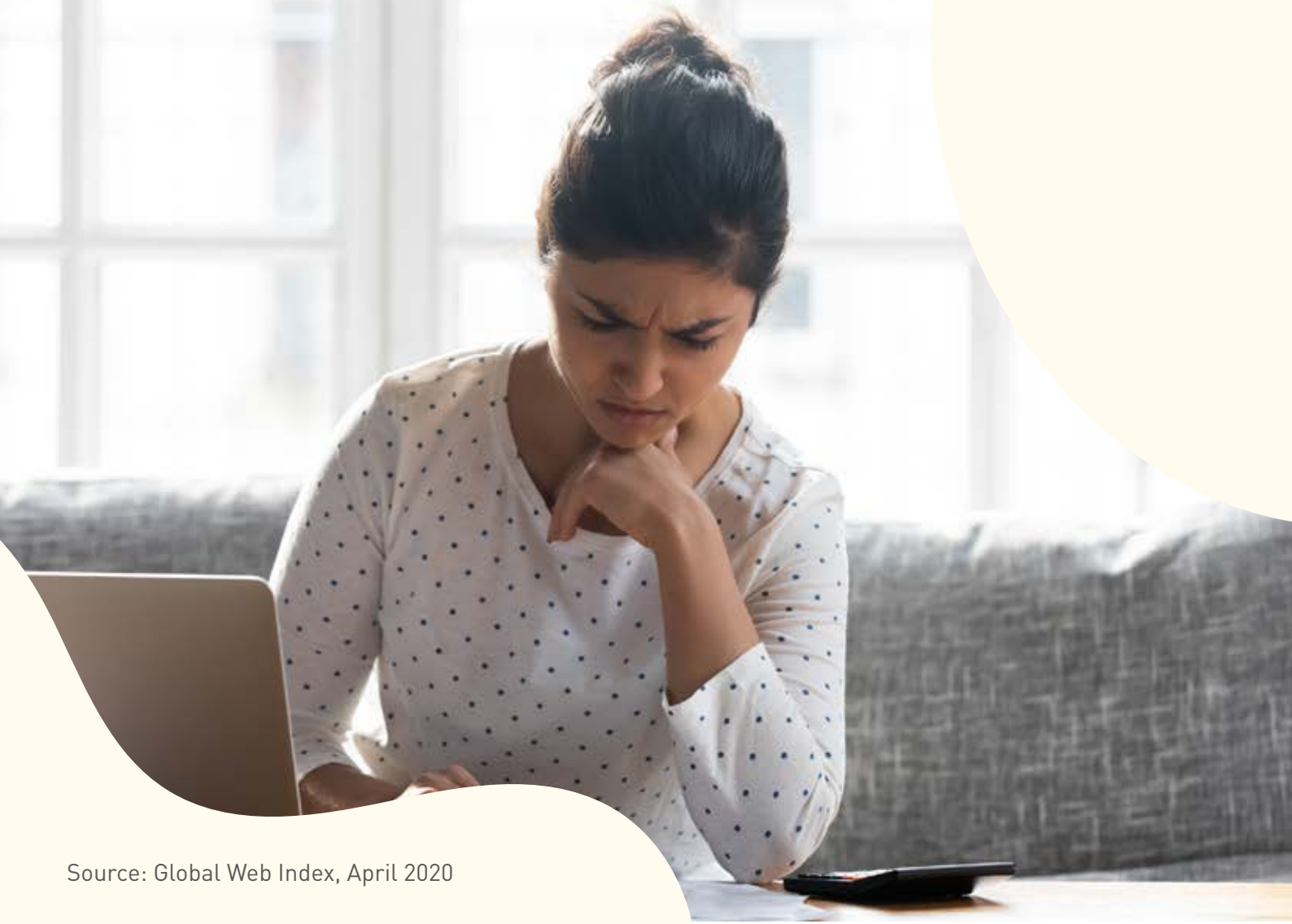
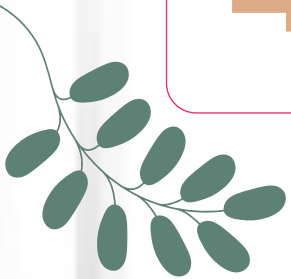
Compared to previous period



## WITH A DEEP CONCERN ON PERSONAL FINANCES ALSO AT THE FORE

43%

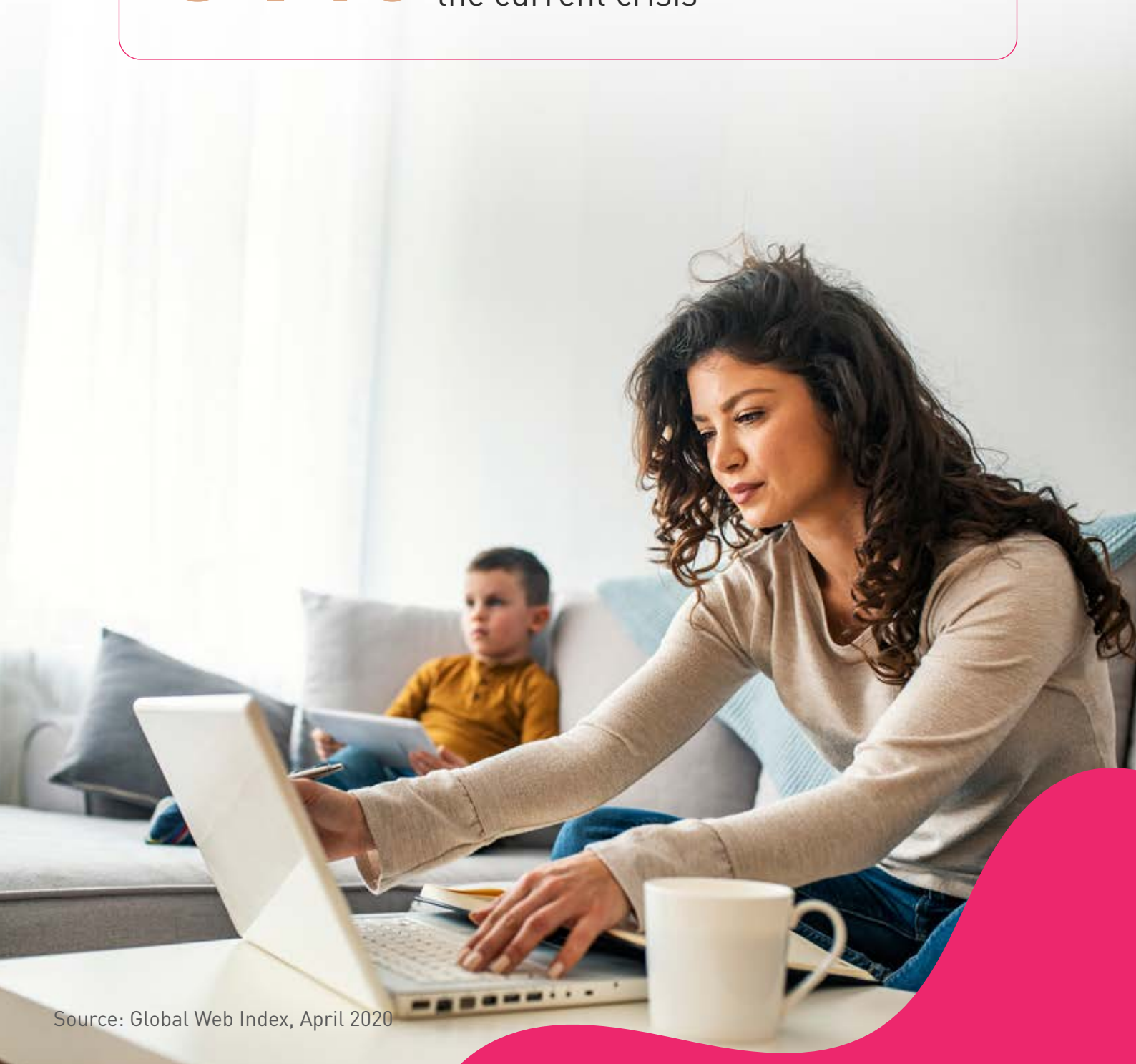
of Indians surveyed stated they are expecting the crisis to have a big impact on their personal / household finances





## THE CRISIS HAS IMPACTED TIME SPENT ON ONLINE SHOPPING

**61%** of Indians surveyed reported less time shopping online in the wake of the current crisis



## WITH CONSUMERS DELAYING PURCHASING CLOTHES IN THE CRISIS

**43%** of Indians surveyed have delayed purchasing clothes in the outbreak





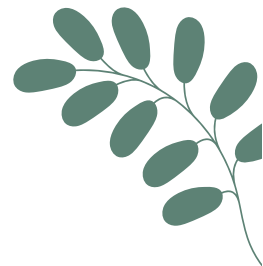
# AS THE WORLD PAUSED... THE WORLD OF FASHION CAME TO A PAUSE.

- Sales have ground to a halt
- Store closures have led to huge inventory pile-up
- Store expansion plans halted
- Production of autumn-winter collection stopped
- Industry's workers face wage loss and layoffs
- Brands have to relook at business strategies





# THE FASHION INDUSTRY STEPPED UP ITS EFFORTS TOWARDS COVID-19



**77B**  
Impressions

**20.5M**  
Mentions

**6M**  
Users

## EARLY CHANGES AT FASHION WEEKS

With a phenomenal reach of 93.3M and 57.2M Daily mail and the Washington post shared an article about "Closed doors show by Armani at Milan Fashion Week" a total of 3.4K conversations around this topic was shared.

## NEW COLLECTIONS LAUNCHED WITH A HOME SHOOT

Armani halts fashion production to make medical overalls.

Zara models launch a new collection with a shoot taken at home.

## BRANDS REWORKED RESOURCES TO MANUFACTURE WHAT WAS NEEDED

Zara owner offers to make Hospital scrubs in order to support the current pandemic that broke out. Before this, Zara announced to donate masks for the coronavirus pandemic.

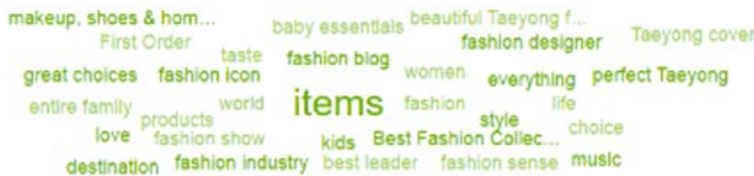
## FASHION WEEKS IN JUNE TO GO ONLINE

Article by the Guardian UK, the London fashion week to go online.

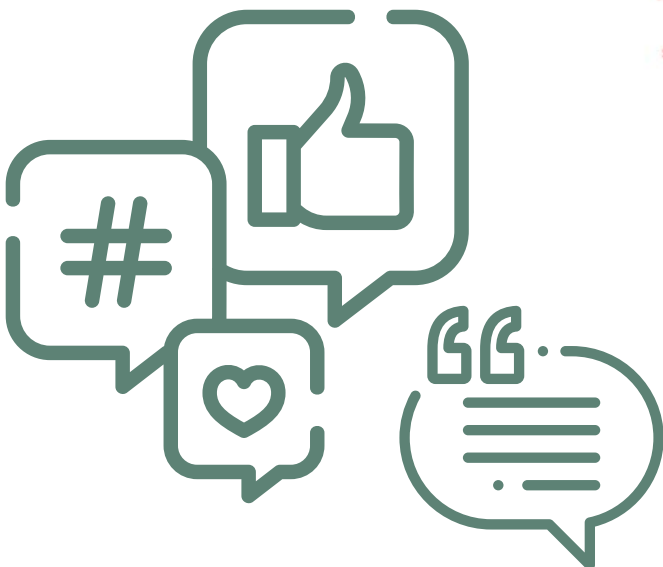
# INITIATIVES BY FASHION GIANTS IN SUPPORT OF THE PANDEMIC RESULTED IN POSITIVE SENTIMENTS



Top Positive Keywords



Top Negative Keywords



CLOSER HOME, WITH THE  
NATION TALKING ABOUT

# STAYING HOME

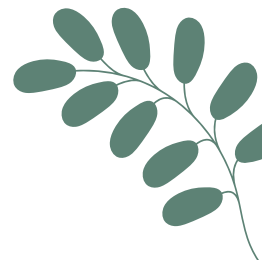
HYGIENE  
MEASURES  
AND THE  
POSITIVE  
IMPACT ON  
ENVIRONMENT

FASHION BRANDS TOO  
JOINED THE CONVERSATION





# CONVERSATIONS FOR COMPETITION BRANDS IN APRIL REVEAL EFFORTS TO FIGHT CORONAVIRUS OR INNOVATIONS SUCH AS 'NATURALLY CLEAN FINISHING' WHICH FOCUS ON SUSTAINABLE FASHION

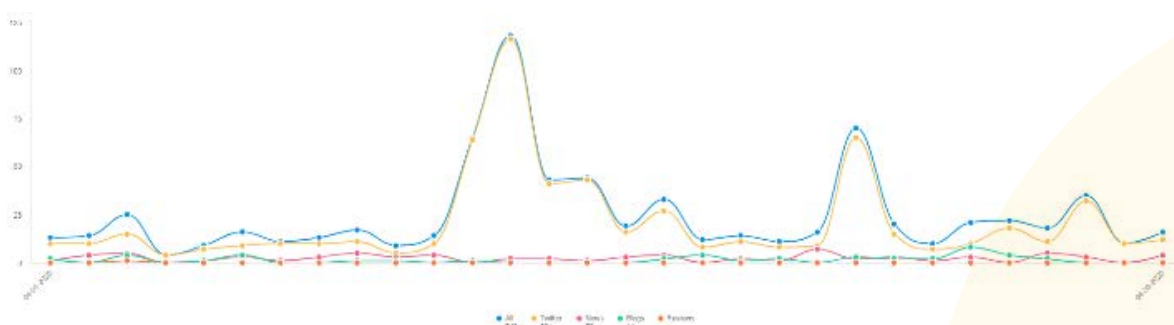


## CONVERSATIONS BUZZ: TIMELINE

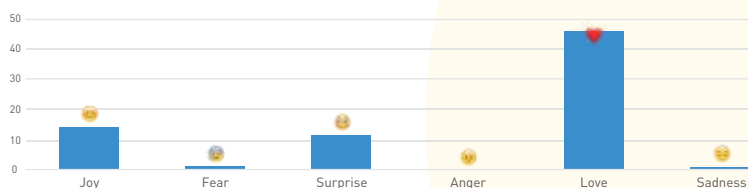
Hanro, the Swiss brand that offers luxury underwear, daywear, nightwear & loungewear, is presenting its basic essential 'Balance' range of t-shirts made of Tintex fabric, enriched by Naturally Clean finishing.

Wrestlers have been sewing face masks to make money during the pandemic: Some, but using the material we had for the costumes. We use spandex and fabrics as used in the wrestling suit.

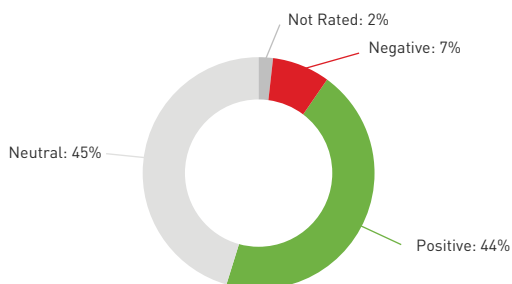
Palmers join forces to fight coronavirus



Emotions shared across competition brands was observed to be majorly in Joy and Love zone.



## SENTIMENT



Slight dip in the conversations from the past month.

Stories around, pandemic support and various initiatives were being taken by brands across the industry. Palmers join forces to fight coronavirus.

# AND WITH INDIANS STAYING HOME, 'WFH WEAR'- A NEW OPPORTUNITY WAS BORN, WHILE THE 'WISHLIST NOW' OPTIONS KEPT CONSUMERS ENGAGED WITH FUTURE FASHION PURCHASES

**The Label Life**  
17 April at 08:30 · 🌐

Since our courier partners cannot deliver your fabulous orders right now, why not take this time to **WISHLIST** your favourites that you can purchase once things are back to normal?

Oh, and wishlist now, wait for surprises later!

Visit <https://bit.ly/2yida6l> to get started.... See more



👍👍 23

**DIBA**  
11 May at 00:59 · 🌐

Cosy dresses for days ahead 🌿  
Work from home duties call for easy-breezy silhouettes to get us moving comfortably all day long!  
Click on the link <https://bit.ly/3bhKPaq> to shop now 🛒  
Extra 5% OFF on ALL PREPAID ORDERS 🎉



👍👍👍 475

0 comments 12 shares

**The Label Life**  
17 April at 08:30 · 🌐

Hello,  
As we work through self quarantine day 2, we highly encourage you to step on your balcony get some sun while of course, being appropriately clothed for the next impromptu call.  
Thanking you... See more



👍👍 23

Like Comment Share

**Lifestyle Stores**  
10 April at 22:34 · 🌐

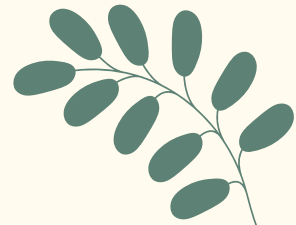
Make exercising at home your way to achieve your fitness goals and keep the #MondayMotivation going with activewear by Kappa from Lifestyle!  
#LifestyleStores #FreshFashion #NewCollection #NoOutDaysWithLifestyle #Athleisure #StayHome



👍👍 127

**“Post-Covid, there will be a new sensitivity and understanding of what we have done that needs to be enacted in the way we live. It may mean many of us will buy less, but better quality.”**

Tarun Tahiliani  
Veteran fashion designer



## THE KEY TAKEAWAYS – LOCKDOWN LESSONS

Brands engaged with consumers and didn't go dark. 'Going dark' can weaken consumer 'bonding' metrics

### Approach 1:

Direct response. Do good through efforts to combat Covid-19

Brands stayed away from self-serving communication

### Approach 2:

Educate consumers with public health messages or sustainable fashion

Brands added frames of support, information and consolation to their messaging

### Approach 3:

Repurpose Spring Summer or the recent collection to 'Work from Home' Wear





**UNDERSTANDING  
CONSUMER  
BEHAVIOUR &  
SENTIMENT IN  
THE POST  
LOCKDOWN WORLD**

## CONSUMER SENTIMENT SURVEY DETAILS



Women

79%



Man

21%

Below 18, 18 to 55 years



AN ONLINE SURVEY CONDUCTED  
THROUGH GOOGLE SURVEY  
BETWEEN APRIL 28 – MAY 8, 2020

SAMPLE SIZE  
ACHIEVED: **440**

### SOME OF THE CITIES COVERED:

Mumbai, Ahmedabad, Pune, Indore, Delhi, Ghaziabad, Gurugram, Bangalore, Hyderabad, Chennai, Kolkata, Surat, Udaipur, Nashik, Cuttack, Lucknow, Bhubaneshwar, Chattisgarh, Jabalpur, Ranchi, Latur, Hubli

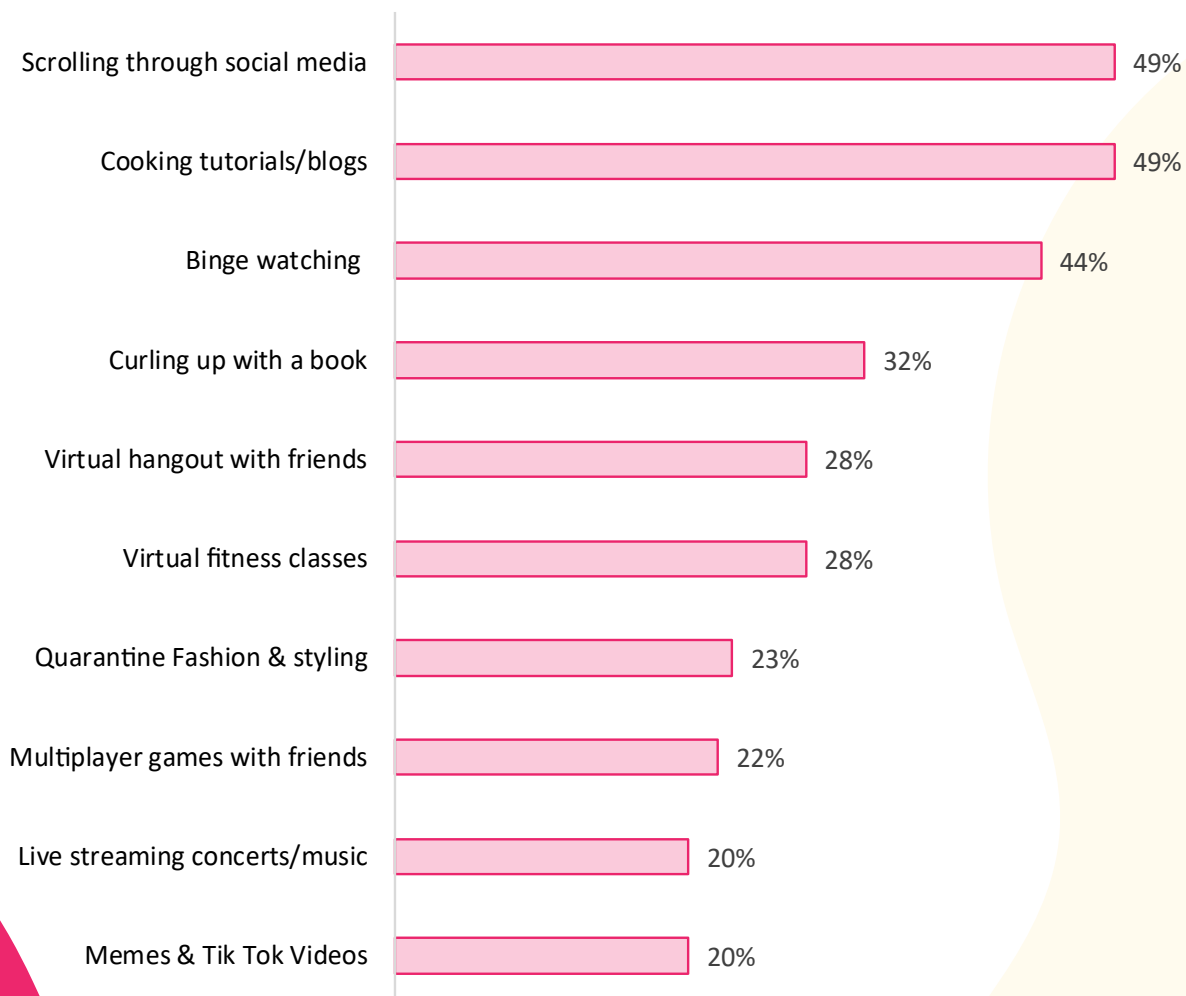
# PEOPLE HAVE ADJUSTED TO NEW WAYS OF LIVING AND ARE LEARNING TO COPE

In India, social media is their window to the world and connections, cooking keeps them happy and binge watching keeps them entertained. New behaviours which may stay for awhile post lockdown



“However, while immediate needs are stabilising, people are continuing to look for new ways to pass their time. Whether it’s preparing their outdoors space for the summer, exploring pet adoptions, spending time with friends and family online, or looking to DIY their self-care, beauty, baking, and home decor, people are adapting and being creative with how they spend their time.”

## CONSUMER’S GO- TO SOLUTION FOR BOREDOM THIS QUARANTINE

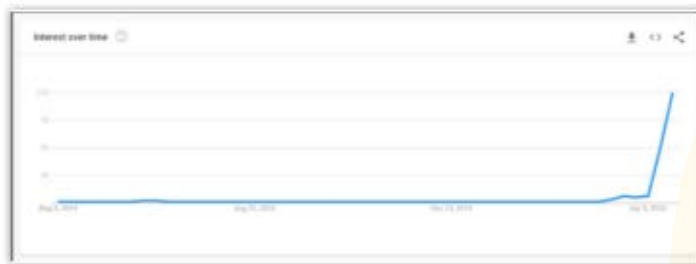




# THERE IS A STRONG DESIRE TO RETURN TO NORMALCY

## AROUND 1 IN 3 CONSUMERS WANT TO SET OUT ON A ROAD TRIP ONCE THIS IS OVER

REOPENING SEARCHES REACHED HIGHEST PEAK OF POPULARITY AROUND THE WORLD



Source: Google Trends' data measures interest in a topic across search, from around the world. 100 shows peak popularity for the term.



17%

Dress up and go out to party



19%

Need my salon or spa therapy



17%

Love the lockdown, please leave me alone

THE ONE THING CONSUMERS CAN'T WAIT TO DO ONCE THIS IS OVER



4%

Go shopping with all the money I saved by WFH



13%

Buy out all the stuff I added to the cart



30%

Road trip with my friends

GLOBALLY TOO, ROAD TRIPS ARE A TREND TO WATCH OUT FOR

Source: LIVA India Survey – A world Post Lockdown, Sample: 440



# HOWEVER WITH THE IMPACT OF THE CRISIS ON THEIR PERSONAL FINANCES, CONSUMERS PLAN TO CURTAIL EXPENDITURE ON CERTAIN OUTDOOR, SOCIAL EXPERIENCES

Only 1 in 4 likely to cut down on retail therapy (online or in-store)

## Impact on Personal / Household Finances

% who say they expect coronavirus / COVID-19 to have the following effect on their personal / household finances

	AE	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
No impact	10	14	5	14	10	17	27	3	9	9	4	15	1	4	4	6	22	22
Small impact	43	42	33	40	58	41	39	29	42	39	34	47	13	35	18	29	39	38
Big impact	32	28	38	29	23	28	16	53	27	34	42	27	62	41	52	40	23	23
Dramatic impact	11	9	18	11	8	7	9	13	12	9	9	7	24	13	21	11	8	8
Not sure	4	6	5	5	1	7	10	3	11	8	12	5	0	7	5	14	8	10



**45%**  
Dining out



**41%**  
Movie going



**22%**  
Taking trips



**23%**  
Makeover at salon



**16%**  
None of the above



**26%**  
Food delivery



**26%**  
Retail therapy  
(online or in-store)

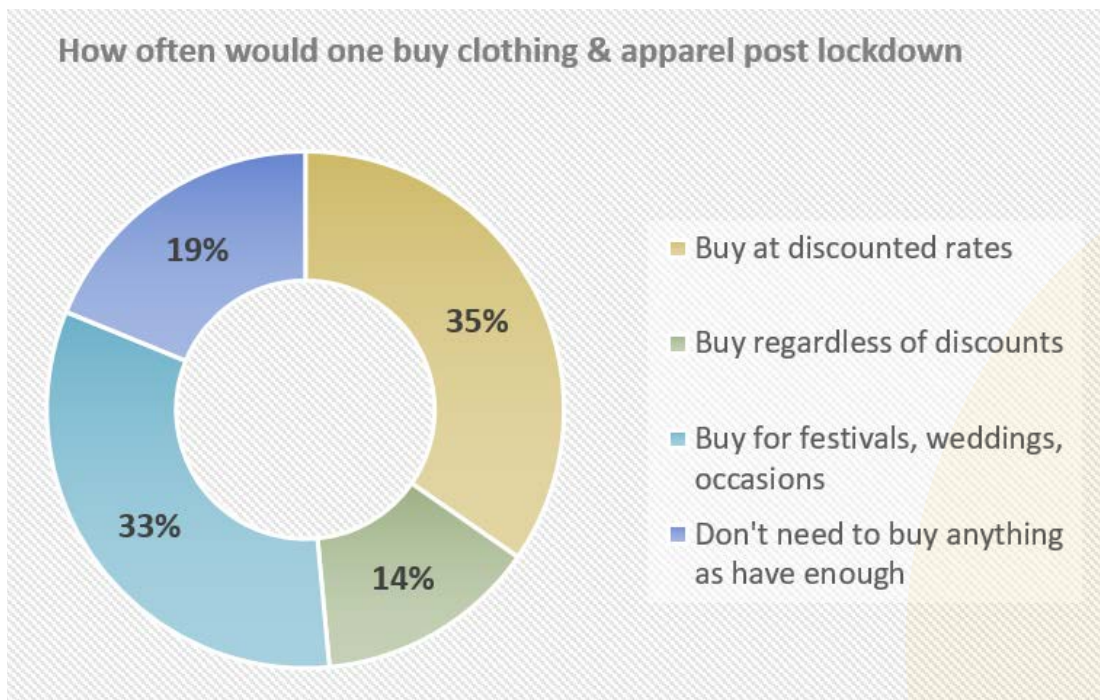
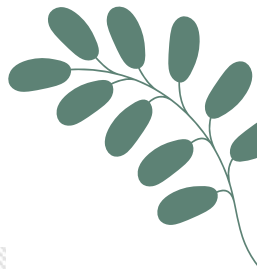


**35%**  
Concerts

**CUT DOWN  
SPENDING ON  
THE FOLLOWING  
EXPERIENCES**

# GIVEN THE CRISIS, FINANCIAL UNCERTAINTY WOULD TRUMP FASHION SPLURGING

1 in 3 people (35%) say they will buy clothes at discounted rates, while around 1 in 2 consumers will defer their purchase for apparel



## SEASONAL COLLECTIONS ARE UNLIKELY TO CAPTURE CONSUMER'S ATTENTION. BRANDS MAY HAVE TO LOOK AT PLANNING A NEW COLLECTION EVERY TWO MONTHS

1 in 3 consumers say seasonal collections never mattered to them. Only 1 in 4 consumers likely to buy the current Spring Summer collection. 3 out of 4 of consumers are likely to wait for a new collection, have already bought what they need or not going to buy clothes for awhile.

### WHAT'S TRENDING ON YOUR FASHION WISHLIST?



This season's summery dresses

26%



Something which says next season

23%



New seasonal collections don't matter anymore

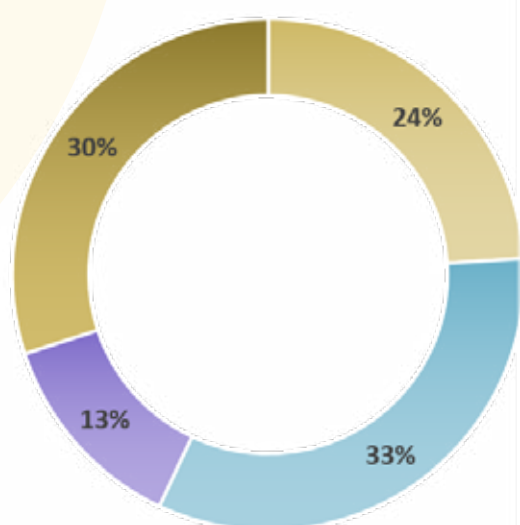
15%



New seasonal collections never mattered to me

36%

### WHICH OF THE FOLLOWING IS TRUE FOR YOUR NEXT OUTFIT PURCHASE?



- I'll buy the current Spring Summer collection by brands
- I'll wait for a new collection by brands
- I have already bought my favourites from spring summer and am good
- I'm not going to be buying any clothes for awhile



## VOICES FROM THE INDUSTRY ALSO FEEL THE INDUSTRY IS MOVING TOWARDS FEWER, SMALLER AND MORE SEASON-LESS COLLECTIONS

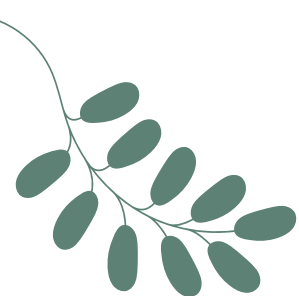
"WE USUALLY PLAN OUR COLLECTION FOR A PERIOD OF SIX MONTHS, WE NOW NEED TO PLAN A NEW COLLECTION EVERY TWO MONTHS AND HAVE AT LEAST 6-7 COLLECTIONS A YEAR. THAT'S HOW WE CAN MANAGE OUR INVENTORY MORE EFFICIENTLY."

**KAVI MISHRA,**  
MANAGING DIRECTOR AND CEO  
OF HOUSE OF ANITA DONGRE



"THE SEASON CONCEPT IS SOMETHING WHICH WE HAVE ADOPTED FROM THE WEST AND IT DOESN'T FIT INTO INDIA WHICH HAS VARIED CLIMATES. CORONA WILL FORCE RETAILERS TO LOOK AT DEMAND-LED MODELS, AND ONCE THAT HAPPENS END OF SEASON SALES WILL BE ABOUT LIQUIDATING EXCESS INVENTORY."

**AMIT KUMAR,**  
SIRROHI, HEAD, RETAIL BUSINESS, RAYMOND



## ALONG WITH THIS SHIFT, ANOTHER MAJOR SHIFT IS FASHION WILL MOVE TOWARDS A GREENER AND FAIRER FUTURE, WITH A MORE CONSCIOUS CONSUMER DRIVING THIS CHANGE

3 out of 5 consumers will switch to a more sustainable way of life in general  
2 out of 5 consumers will choose brands which are sustainable and support sustainable practices



### THE EARTH IS HEALING! WHAT ARE THE STEPS YOU WILL TAKE FORWARD FOR THE ENVIRONMENT?



**61%**

would switch to a more sustainable way of life – public transport/car pools, recycling



**33%**

would buy and support sustainable brands



**4%**

think one individual can't create an impact, so won't take any steps



**2%**

don't care about the environment

### WHAT IS THE FIRST STEP YOU WOULD TAKE WHILE SHOPPING TO REDUCE THE NEGATIVE IMPACT ON THE ENVIRONMENT?



**42%**

would choose brands which are sustainable and support sustainable practices



**33%**

would minimize my closet and move towards upcycling and reusing clothes



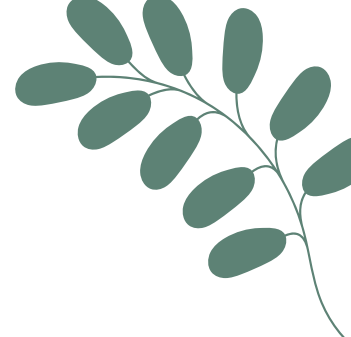
**13%**

would dispose of their clothes consciously for recycling

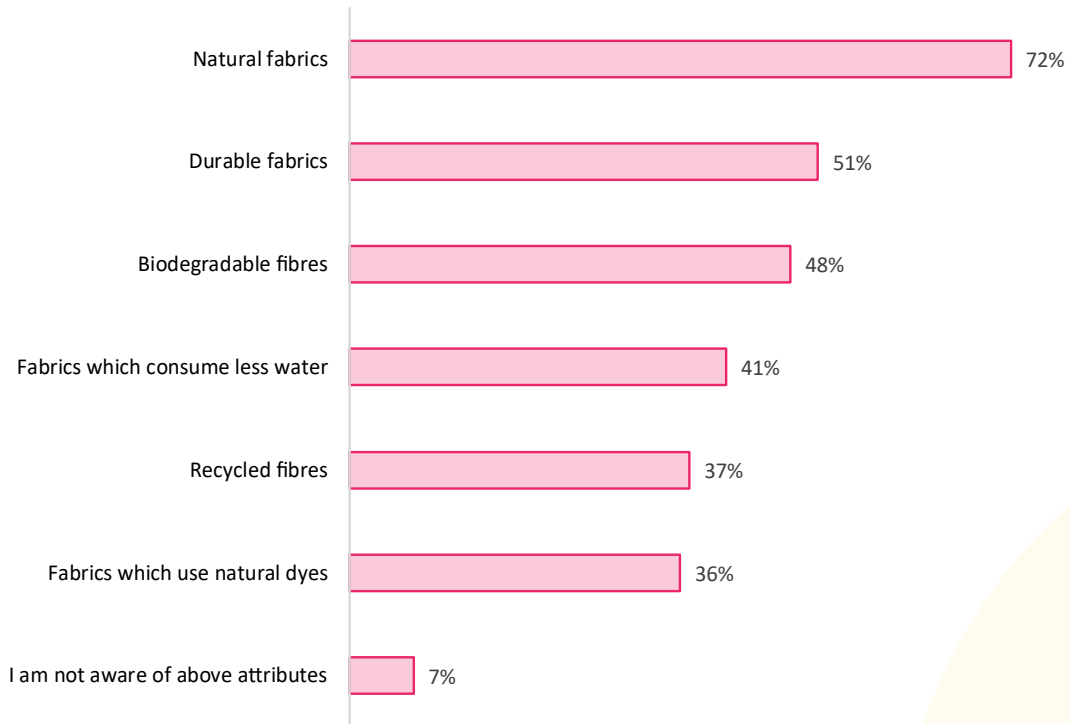


**12%**

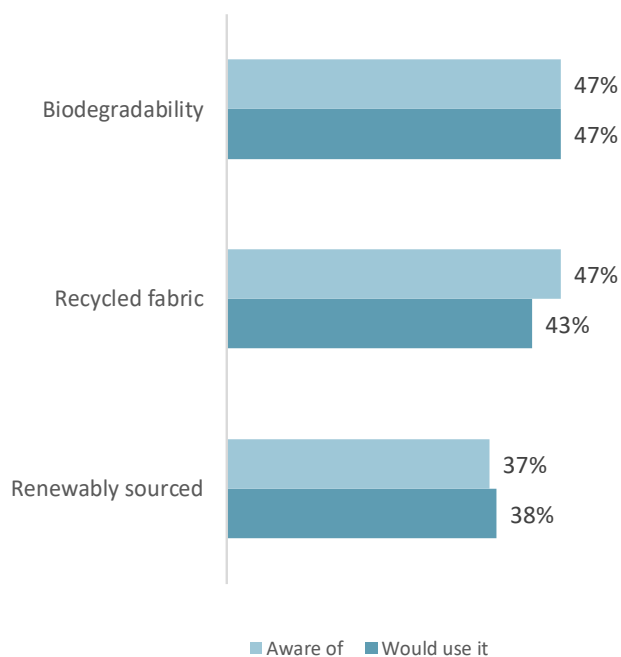
would make no change



# AS CONSUMERS SWITCH TO 'RESPONSIBLE FASHION', THE TOP 3 ATTRIBUTES THEY WOULD LOOK FOR ARE



## AWARENESS & ADOPTION OF FABRIC PROPERTIES



# HALF THE CONSUMERS SAY THEIR ATTITUDE TOWARDS CLOTHES HAS CHANGED POST THE LOCKDOWN EXPERIENCE, HINTING AT CHANGING CONSUMER ATTITUDES TOWARDS FASHION

## YOUR ATTITUDE TOWARDS THE CLOTHES YOU WEAR AFTER YOUR LOCKDOWN EXPERIENCE?

**26%** say their attitude has changed and they will buy clothes as the need arises – for occasions etc

**18%** say their attitude has changed and they have discovered that comfort wins over style

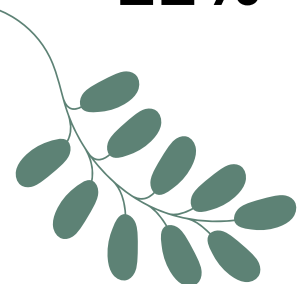
**12%** say their attitude has changed and they feel they can live with less clothes and declutter their wardrobe

1 IN 2 SAY THEIR ATTITUDE TOWARDS FASHION HAS CHANGED

**22%** say their attitude is the same – they love styling and trying a new look everyday

**22%** say their attitude has not changed greatly

AROUND 2 OUT OF 5 SAY THEIR ATTITUDE TOWARDS FASHION IS THE SAME

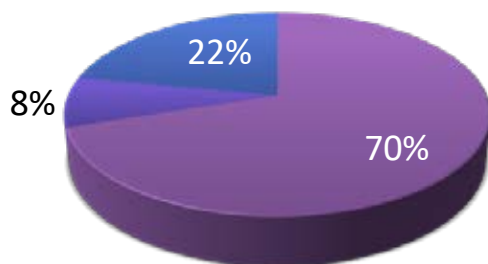






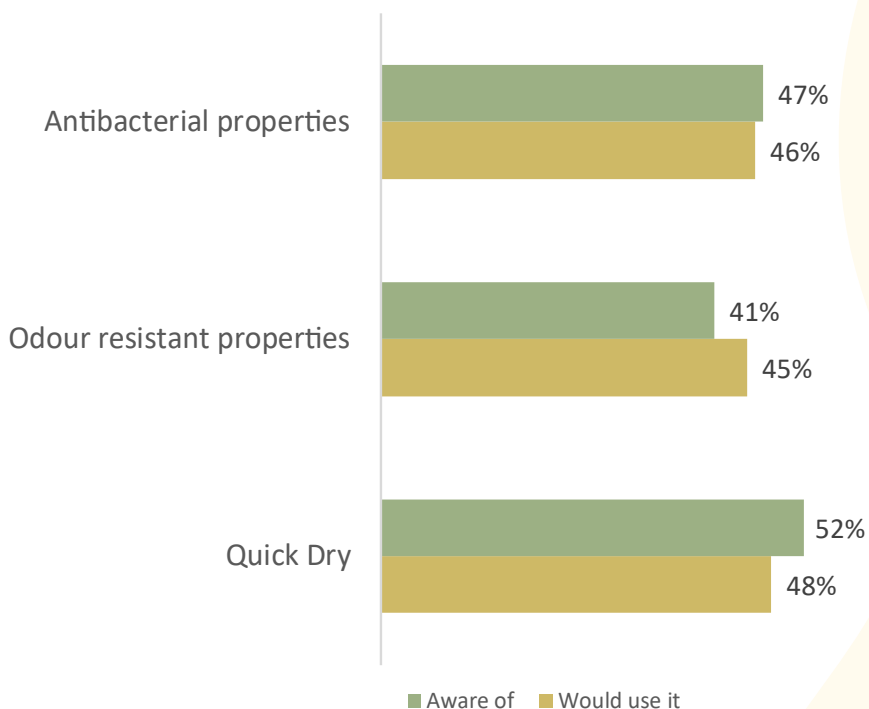
# CHANGING CONSUMER ATTITUDES AND NEEDS ARE GOING TO SHAPE A NEW DIMENSION OF FASHION - FASHION WHICH ASSUMES A DEEPER NARRATIVE OF WELLNESS

## YOUR TAKE ON WEARING PROTECTIVE MASKS?



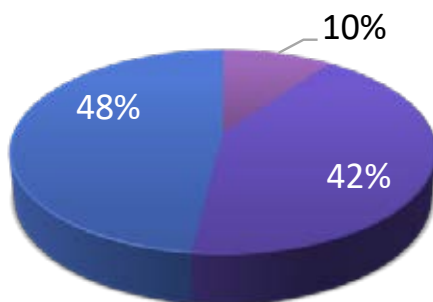
- Like the idea as I need to protect myself
- Like the idea and see it as a fashion statement
- Don't like the idea but it will be mandatory

## AWARENESS & ADOPTION OF FABRIC PROPERTIES



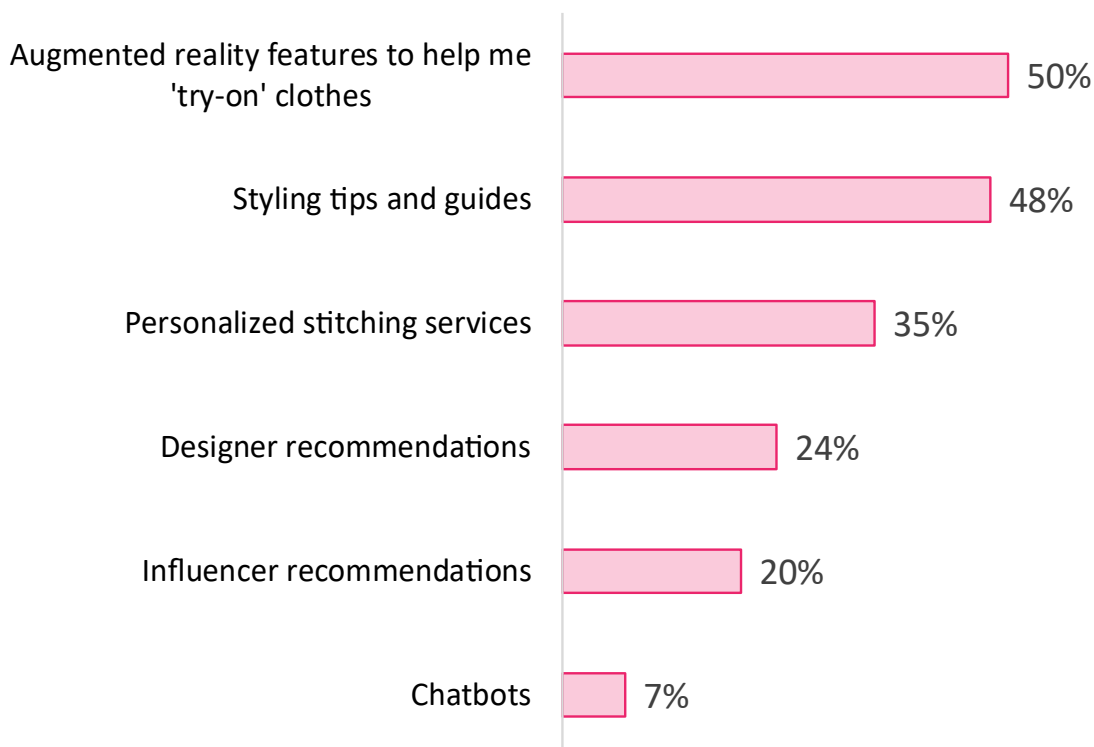
# IN THIS CHANGING WORLD, BRANDS WOULD HAVE TO REACH THE CONSUMER WHERE THEY ARE, GIVING RISE TO DIGITAL AS THE NEW STOREFRONT AND EXPERIENCE BEING THE DIFFERENTIATOR

## OUTLOOK TOWARDS RETAIL THERAPY POST LOCKDOWN



- Going to be shopping at the mall
- Distance myself from shopping for a month or two
- Will switch to online shopping for 3-4 months

## WHAT WOULD MAKE YOUR ONLINE SHOPPING EXPERIENCE BETTER?



## VOICES FROM THE INDUSTRY ALSO SPEAK ABOUT HOW BUSINESS WILL BE ALTERED

"NOT ONLY THE WAY BUSINESS IS DONE WILL GET ALTERED, EVEN THE INNER MOTIVATION OF CONSUMERS TO COME OUT OF THEIR HOMES TO SHOP WOULD BE ALTERED."

AMIT KUMAR SIRROHI,  
HEAD, RETAIL BUSINESS, RAYMOND

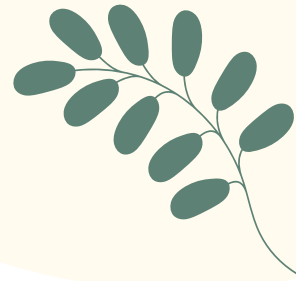


"WE HAVE TO START LOOKING AT ONLINE AS A WAY OF SELLING AND NOT AS A DIFFERENT CHANNEL. BRANDS NEED TO GET THEMSELVES LISTED ON PLATFORMS SUCH AS MYNTRA OR AMAZON AND ALSO GET THEIR OMNI-CHANNEL PLATFORMS ACTIVE."

SUMIT GHOSH,  
DIRECTOR, FOSSILS INDIA.

**“The Covid-19 outbreak will help the fashion industry intersect more with technology, including more widespread use of QR codes and no-touch payment methods. It could help propel the industry into a more sustainable and technologically innovative future.”**

Christopher Lacy, a fashion consultant  
Business Insider, India



## THE KEY TAKEAWAYS – A WORLD POST LOCKDOWN

Financial Uncertainty  
would trump Fashion  
Splurging

Consumer attitude  
towards fashion has  
changed – need  
based purchases

Appetite for “New”  
would be met by the  
skipped “Current”

Fashion with a  
Heart for the Earth

Fashion assumes a  
deeper narrative of  
wellness

Virtual would be the  
‘New Store’,  
Experience the  
Differentiator



# PLANNING BEYOND THE LOCKDOWN



## TEN ACTIONS FOR BRANDS AS IDENTIFIED BY A WARC REPORT

### How to plan past the lockdowns

As lockdown measures are lifted and the recession takes hold, here are the key actions to take to help brands rebound.

The actions vary depending on a company's resources, and if operating in a boom or bust category.

All brands, regardless of the state of play should aim to help, be customer-led, understand changes in spending behaviours, monitor consumer insights and spend wisely.

1

Review your lockdown playbook

2

Keep advertising, if you can

3

If you have to reduce adspend, use other levers to remain visible

4

Maintain creative where possible

5

Tailor your approach to brand-building and activation

6

Kill or cut back on 'dwarf' brands

7

Look for signs of new habit formation

8

Audit your e-commerce capability

9

Build strategic alliances

10

Review pricing – but try to avoid discounting



## LESSONS FROM CHINA FROM NIKE'S FOUR STAGE MODEL

### Nike's four-stage model for recovery in China

Nike, the sportswear company, has outlined four stages to the crisis in China that can help other brands plan, particularly those with retail outlets.

It is significant because, like Coca-Cola's plan on the next slide, it anticipates a significant period of 'normalization' before a period of economic stability returns.

#### 1. Containment

- Shut stores to protect employees and public
- Shifted to online - It's digital business grew 30%
- The Nike Training Club app grew 80% vs. the previous quarter
- It offered it's \$14.99 training app free for 90 days

#### 2. Recovery

Cautious transition to opening stores, with different regions opening at different times

#### 3. Normalization

Up to 80% of stores are now opened

#### 4. Return to growth

A greater focus on a seamless digital/physical experience

Nike is investing in its **direct-to-consumer proposition**, and finding ways to connect its online and mobile hubs with physical retail





**“Marketing is swiftly moving beyond branding and communications to providing business solutions that address people’s needs... We’re taking on a new leadership role, connecting multiple disciplines within the organization to accelerate programs that make a difference in our communities and people’s lives.”**

Jodi Harris

*Global VP for Marketing, Culture and Capabilities, Anheuser-Busch InBev*