The Impact of COVID-19 on the Fashion Industry: A Generation Survey

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Abstract
The market scenario is characterized by a profound crisis caused by the Covid-19 pandemic that, inevitably, changing and damaging a huge part of the world trade, affecting especially the sectors producing goods that are not considered essential, such as the fashion industry. This sector is strictly affected by the personal ideas of the individuals and their decision-making habits and it is strongly influenced by the role of sustainability. How a consumer can approach fashion goods have profoundly changed in recent years, as more and more consumers' choice are driven by several factors not linked to the need to buy clothes but related to the personal pleasure to purchase a fashion item. Considering these elements, the paper analyzes the emerging trends in terms of customers' preferences, driven by the actual outbreak situation, with a specific focus on the digital and always connected Z-generation that is using the web and online channels for any kind of product and service needed. First, the paper provides a wide analysis of the fashion industry and its market sectors, using a comparison method to propose a clear picture before and after the actual pandemic situation useful to understand the changes and the different ways of shopping used by consumers during these months. Subsequently, the Z-Generation is described in terms of both of main features and preferences concerning the fashion items to purchase. A questionnaire related to the first lockdown period in Italy was administered. The analysis is focused on the main changes caused by the Coronavirus crisis for coping with the new sanitation regulations which allowed fashion companies to experiment with new selling formats to still attract customers. In addition, the paper examines the respondent's reaction concerning the new rules by highlighting the effects in terms of preferences related to the channel used for the purchase of fashion clothing.

Keywords
COVID-19; Fashion industry; Fast fashion; Decision-making; Consumer preferences.

Introduction

The current pandemic outbreak situation, combined with a lockdown strategy, has changed the habits of the world's population due to the introduction of a series of restrictive measures and brought countries into the worst global economic crisis of the last three decades. Many companies have been forced, with a brief notice, to stop or significantly slow down both their production and commercial activities and were not be able to plan the reopening of activities at a certain horizon. Obviously, different production sectors have registered different economic impact levels.

The fashion industry, in particular, was heavily impacted by the COVID-19 pandemic and, right from the first weeks of the lockdown, it detected all the limits of the traditional business models adopted, in particular those based on the "fast fashion" paradigm (Boykoff et al., 2021). Considering the peculiarities at the base of the fast fashion business model, such as excessive production waste and the management waste disposal, strictly related to an abundance of supply, the impact on this sector - which has a highly globalized supply chain -,was relevant from an economical and productivity point of view. The different productivity phases can be dislocated in countries that are geographically far and, in the COVID-19 framework, this element has strongly sharpened the crisis of the whole industry. COVID-19 has therefore highlighted the limits of this market system that has already been under extensive criticism and discussions for years, or rather of a system based on production processes that unfortunately cannot be defined in any way as "sustainable" (Chakrabborty & Biswas, 2020). According to several studies conducted by the European Union, the fashion industry, which represents about 3% of the gross domestic product of the EU (EU, 2021) has a relevant impact on the environment.; an example is the number of liters of water used to produce a t-shirt (2,700) that is a value higher than the water consumed by 2 people in 1 year. Overall, it was estimated that, in 2015 alone, the textile and clothing industry used over 79 billion cubic meters of water, equal to almost 30% of the total water needs of the EU population (Jacometti, 2019). Similarly, it is estimated that textile production is responsible for about 20% of the global pollution of clean water caused by coloring and finishing products and 35% of the total microplastics released into the ocean (Niinimäki et al., 2020). Before analyzing the fashion data market related to the pandemic period it is mandatory a brief focus on sustainability practices and procedures.

With specific reference to the fashion sector, the approach to sustainability impacts the entire supply chain, involving all elements of the value chain, starting from planning and design up to the final distribution and use model of the asset itself (Woodside & Fine, 2019). In the efficiency process that each company pursues its business, the aim should be the integration, into the company's core business, of strategic sustainable goal such as (Shirvanimoghaddam et al., 2021; Brydges, 2021):

- energy and water efficiency and pay attention to all non-renewable resource efficiency;
- control and limit the waste of materials;
- reduction of non-sustainability costs (and not only those deriving from regulatory impositions);

- ability to innovate in the development of sustainable products;
- improve the circular economy procedures where possible
- greater attention and transparency of information in relations with local communities and with intermediate customers and final consumers

For this reason, we want to analyze any changes in preferences and purchasing intention of consumers, with a special focus on Generation Z, concerning the fashion market. Using descriptive statistics based on a survey we have underlined the differences in these situations between the pre and post-lockdown of 2020 in Italy. Moreover, concerning the role of sustainability-related to future purchasing decisions in this sector, we would like to analyze if there are differences between gender and generations involved.

The dynamics of the Fashion Industry and the COVID-19 impact in Italy

Focusing on purely economic data, in Italy in 2020 the value index of manufacturing turnover recorded a decrease of 11.1% compared to 2019, with similar decreases on the domestic market (-11.1%) and on the foreign markets (-11.3%), largely due to the collapse in the second quarter (around -30%) (ISTAT, 2021).

In Italy, the fashion industry shows a turnover near 80 Billion euros and more than 490.000 workers are involved, it represents 8.5% of the total turnover and 12.5% of the Italian manufactory industry. Its productivity had an increase from 2007 to 2019, focused on the high-quality market segment. The average size of companies is smaller than that of other European Union countries (Scarpellini, 2017). This peculiarity, balanced by a robust interrelation between companies that have a high innovation capacity, allows a high degree of specialization which guarantees strong competitiveness of the supply chain. This feature is confirmed by the export value of the sector and the important role of the national supply chain within the European fashion market. The Italian supply chain is the base for the supply of more than 50% of the worldwide fashion industry sector. Moreover, due to the pandemic situation, it is also one of the most compromised together with the tourism and the food & industries. The production of tissue, clothes, leather, and accessories shows a decrease, in April 2020, of 81% with respect to the previous year. The semi-total closure of commercial channels, except e-commerce, made a contraction in retail sales of clothing and leather goods in April of more than 83% compared to the same month of 2019 (INTESA, 2019).

Considering the entire 2020, this crisis had determined a reduction in the total turnover of nearly the 30% in comparison with the previous year. The lockdown period resulted in the stop of all commercial activities in clothing and accessories stores, affecting approximately 300,000 employees (CDP, 2020). In this situation, the E-commerce channel guaranteed a minimum turnover for companies active in online sales and it has been one of the main factors of resilience in these sectors, but, at the same time, it could be one of the main risk factors for the occupation of traditionally fashion shops.

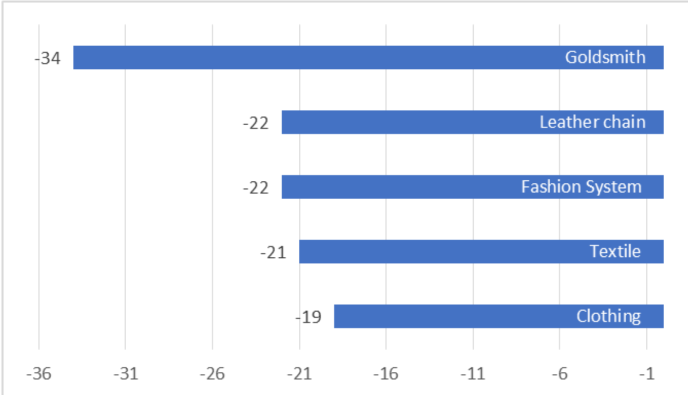

Figure 1. Export Fashion sectors (Variation in %) In Italy Jan 2020- Oct 2020
(Data from CDP, 2020)

The last significant aspect relating to the fashion sector in Italy is certainly represented by the trend in the exports flows. Overall, in the first ten months of 2020, the fashion system recorded a decline in exports of -22%. From the point of view of the temporal evolution, there was an attenuation of the losses starting from June in correspondence with the resumption of activities and movements which even saw the positive return of clothing exports in September (+ 3.5% trend) (ISTAT, 2020b).

A brief overview on generation groups

From a sociological point of view, the term generation identifies a group of people who lived in the same period and was exposed to events that characterized it (Katz, 2017; Dimock, 2019). A generation groups all individuals that are marked by the same events and is distinguished from the cohort of individuals born in the same year, by the fact that they share a value system and a perspective on the future. The fact of belonging to a certain 'time' unites the members of a generation (Dimock, 2019). It is possible to distinguish five different generations that, nowadays, are potentially in the labor market or are studying at the university and, at the same time, their date of birth could be used as a reference for the partition into the different generations (Wardhono, 2018; Puiu, 2017; Berkup, 2014; Arar & Yüksel, 2015).

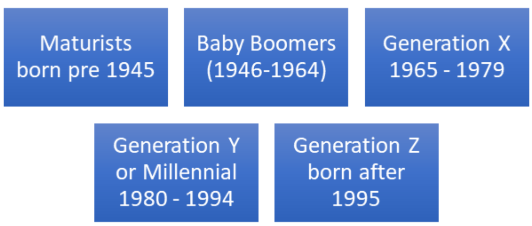

Figure 2. Generation groups

As previously aforementioned the focus of this work is the Z Generation and, for this motivation, in the next paragraph some detailed information related to these individuals is provided.

The Z-Generation

Generation Z is made up of all individuals born between 1995 and 2010; they represent the second generation entering the labor market in the new millennium but the first to be grown up in the same period, which means that they are the first digital natives (Seemiller & Grace, 2018). Several aspects characterized the individuals of the Z-Generation, for example, they approach their work career through a new concept of boundaries and mobility (Cillers, 2017). In fact, they receive a lot of stimulus for travel and change their life place in multiple situations, such as considering university students, the Erasmus (European Community Action Scheme for the Mobility of University Students). Closely linked to the issue of international mobility there is the knowledge of multiple languages: 80% of young people under 34 years of age know a second language in addition to Italian (ISTAT, 2015).

A fundamental element that characterizes the Z-Generation group is technology (they are called the "generation 2.0"). It is known that the technological revolution of these years accelerated by the actual pandemic situation on some aspects, is only at the beginning and it will certainly produce implications on the job market, on the workplaces, and some purchasing decisions. The younger generations are absorbed and immersed in this condition and they have shown their capability to deal with these instruments in different situations (Puju, 2017).

One of the main attractive and interesting aspects, for this generation, is their actual or future job. Due to the changes in the job market, the Zetas tend to accept fixed-term jobs by now, although some studies underline the persistence of the myth of the "permanent job" (Novkovska & Serafimovic, 2018). This is because work is understood by this generation as the key to accessing their social life. On the other hand, however, there is the phenomenon of Neet (Neither in Employment nor in Education or Training), a term created by the U.K. government to identify young people (age between 18 and 24 y.o.) who do not work, do not study and they do not try to change their current life. This phenomenon in Italy is particularly pronounced: more than a quarter of young Italians, who are part of Generation Z, can be included in this category. In fact, in 2020 23.7% of Generation Z was identified as Neet (Statista, 2020), a value clearly above the European (2019 data) average of 16.4% (EU, 2019).

Z-Generation and purchasing decisions

People belonging to Generation Z, as digital natives, are experts in creating online networks in the form of communities, in which any topic is discussed; this also includes reviews, opinions, and opinions about brands. The interaction between brand and customer is no longer just one-sided, now there are many online platforms such as Tripadvisor, Yelp, or dedicated forums where potential customers build relationships based on research and word of mouth to form an opinion on the brand before proceeding with the purchase: the consumption choice of the customer is today more and more becoming a social process (Kotler, 2017).

This generational group is also considered formed by active consumers who are inclined to save money, due to the economic restrictions imposed by the economic crisis (Pangestu & Karnadi, 2020). They are, therefore, very demanding and, in fact, are asking fashion companies for transparency and accountability. Moreover, those who have already reached or are about to reach the job market are looking for a job that satisfies them, having negative expectations and prospects for the future. As for the purchase, their attention is captured by allowing them to test products, offer active in-store experience services and give greater attention to customer service (Sharma, 2019). With this generation, it is not possible to refer to the loyalty of a single brand in the physical sense as it is linked to social media-friendly brands.

Due to the purchasing attitudes expressed by the Z-Generation, which considers technology as the main channel to satisfy their needs as they are connected at all times, the analysis needs to briefly focus our attention on some sales strategy aspects that primary referred to these consumers but that can be used also for the previous generation (Millennials) and also could be a first step for future ones.

As sustained by various authors (Liu et al., 2020; Gazzola et al., 2020; Ananda et al., 2019) a good e-strategy can be developed taking into account the following aspects: vision, authenticity, transparency, interaction, optimization, and importance of the company's core values. Each company needs to have a vision of the entire commercial project, from the structure of the website to the sale of products. Each step must be linked to the site, the product, and the communication following a single basic idea. The vision of the entire commercial project is very important and must be shared with consumers to attract their curiosity.

As regards authenticity, e-commerce must be able to capture the consumer through the authenticity of the products. Each product must be unique, must contain novelties, and express the key elements that characterize the online store. New consumers are always looking for different and innovative products avoiding replications of other brands. Transparency is an essential element for e-commerce; it is the key to obtaining a relationship of trust with customers. Services, terms, and conditions must always be described and updated on the website and through the newsletters. The consumer pretends clarity and precision from the brands.

In the present market framework, customers should not be alone during every stage of the purchasing and buying decision process, moreover, it is essential to implement a strategy that gives adequate importance to interaction with users. The role of reviews is fundamental, the company must make it easily reachable to potential future customers the current opinion of their customers.

Besides a huge part of consumers, both Millennials and Centennials, mainly use smartphones to search for product information and buy online. E-commerce optimization must be flawless and constantly updated to avoid any bugs or incorrect views during a customer's purchasing process.

Finally, the role of the company's core values is growing as the seller is requested to define and spread the core values of its brand. A useful step is to activate a campaign for communicating the core principles of the brand that could help to increase the e-commerce traffic and enhance both brand awareness and reputation. The content is and will be the fundamental element of any e-commerce strategy and for approaching the new generations of fashion consumers it becomes the key point for increasing the conversion rate. The ideal content must offer values that coincide with those of new consumers.

Z-Generation and the fashion market

Nowadays the traditional store is not the only point of sale that a fashion house can own, in fact, thanks to the growing development of e-commerce channels companies can also sell garments online through special applications and make themselves more visible to both consumers and competitors (Ratti, 2019). For iGen the point of sale is still seen as a fundamental contact, which allows them to personally appreciate the quality of the product found on the internet (Ratti, 2019).

Given the high number of time spent by consumers on social media, companies must be able to understand and manage the advantages they could offer, since with traditional media fashion companies are aimed at the general public, while on social networks the houses of the fashion can select a specific market target based on age, geographical location, interests, and habits (Pantano et al., 2019). A trump card to arouse curiosity in the generation in question is to use the Content marketing technique, an approach based on the distribution and creation of content to create a relationship with one's audience and increase sales, as corporate blogs do. To ensure the success of a brand campaign it is necessary to retain the consumer as much as possible, for whom the company could become a real point of reference.

Another fundamental aspect is related to sustainability, in fact, 60% of Zoomers, being very attached to the environment and their surroundings (Sparks & Honey, 2020), declared that they wanted to contribute to creating a positive impact on the world. Therefore, fashion companies interested in this target segment will have to use sustainable strategy and tools or even activate Corporate social responsibility programs, that is "the voluntary integration of the social and environmental concerns of companies in their commercial operations and relations with interested parties (Gazzola et al., 2020b).

In addition, there are other elements to be carefully analyzed. The shopping experience, in the fashion market, is assuming a strategic role the product is not only a tangible asset, but it is also communicating intangible values to the public on an emotional level. The customer experience is the sum of feelings and memories of a person when there is an interaction with a company. Besides, companies need to digitize themselves because Z-Generations prefer to interact with brands in the "self-service" modality. To effectively manage the digital customer experience, within companies, some technologies need to be implemented, including through customized apps allowing satisfying the demand for hyper-personalization of services or “ad-hoc proposals” for the customer. In this way, the analysis of information and data is becoming strategic for the company and data analysts. Moreover, smartphones, allow customers to access the internet always during a day, both for buying or for searching for information about products and services. Many companies during the pandemic have decided to invest in the creation of applications, which are placed side by side with the traditional store; in this way, they are able to propose to customers a better shopping experience and communicate a precise brand image. Finally, within the present market framework, two other relevant aspects are emerging and strongly affecting the fashion market: social networks and influencers (Kaplan & Haenlein, 2010; Jin et al., 2019).

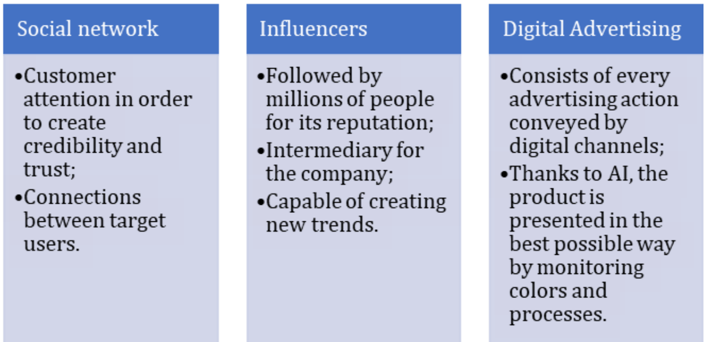

Figure 3. Fashion market elements

Considering the different peculiarities of the consumer of Z-Generation, combined with the pandemic situation relating to the first wave of 2020 and the consequent restrictions in Italy (for further information see Ceron et al., 2020, and Peluso et al., 2021), the paper analyses how consumer moved during and after that period regarding the purchase of clothes. For the purpose of this work, a research question is formulated:

RQ: Has the pandemic changed the purchasing method of consumers and especially for the Z-Generation?

Data and survey

In the period 12 March-4 May 2020, Italy was inserted in a protected area where were allowed only some movements for necessity or work. Commercial activities were closed, except for basic goods; consequently, the entire fashion and clothing sector had to close their stores. In this period, it was allowed to make all categories of online purchases; this is a very important detail for the purposes of our analysis. Mainly, the work is based on a data collection based on three phases:

- The behavior of respondents in the pre-pandemic period
- The purchase decisions during the lockdown and the perspectives for the future starting from June 2020.
- The importance of sustainability for future customer purchasing decisions.

Data Collection

The data collection process is related for the period August 2020 until October 2020, using the platform Google Module and the dissemination phase was based on email and some social media. The survey is made by a final sample of 653 respondents (443 are related to Z-Generation). The sample is composed of 430 females and 223 males (concerning the Z-Generation there are 243 females and 200 males)

The following analysis is based, for most, on the respondents of the Z-Generation.

Results

Purchase intention pre COVID-19

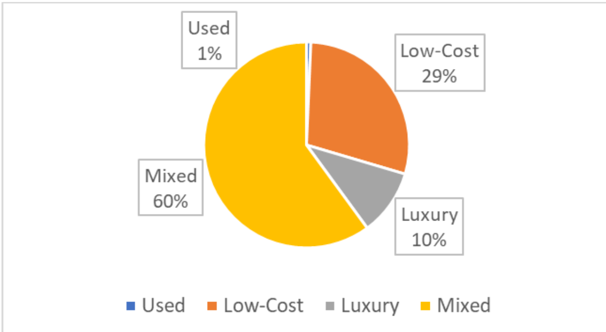

Figure 4. Purchase intention pre COVID-19

As emerged in Figure 4, one of the most important information asked to the sample was to understand their preferences concerning clothes. The majority of the sample (60%) affirmed that they usually buy both low-cost and luxury clothes. From this perspective, it can be analyzed that Generation Z does not like to practice impulsive purchases, and the same percentage affirmed that they use mostly family savings to purchase clothes. Another element was related to the relationship and the importance of sustainability and the circular economy in this field. 75% of the sample considers this aspect important but this data does not emerge from the previous graph, in fact, only 1% said they buy used clothes.

As for the pre-lockdown purchase methods, it emerges that only 4.29% of Z-Generation usually buy online while 64.79% make their purchases in a physical store, finally the remaining 30.93% use the two channels. The sample shows that, before the lockdown, 27% of them were influenced by one or more social media to buy clothes, against 65% who take their decisions during the purchasing process (virtual or in a shop).

Fashion and lockdown

As is known, during the considered lockdown period, only online purchases of these kinds of goods were allowed. The Z-Generations that declared that they were shopping online, during the period of the shutdown this percentage rose to 56.43%, and of these only 2% of them affirmed a low level of satisfaction. However, as can be seen from the following graph, only 3.20% would not really change anything in the online service.

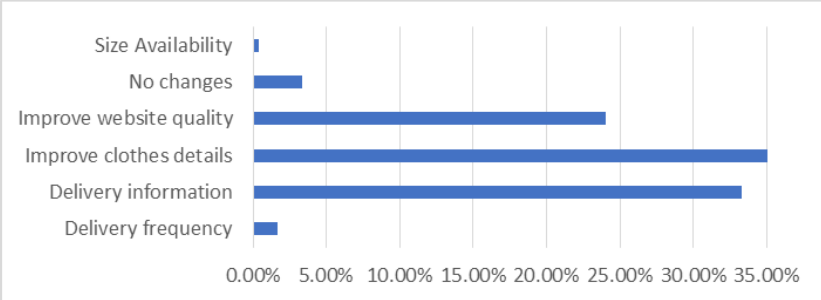

Figure 5. Improvement in the online purchasing process

The most relevant aspects concerning e-commerce for the Z-Generations are related to improving the clothes details on the website, to the information concerning the delivery mode and information, and also to an overall improvement of the company website (fewer clicks, more user-friendly).

Purchase intentions after the lockdown 2020

On May 18, 2020, the entire retail trade network could reopen, under some mandatory security and pandemic measures (masks, limit of consumers per shop, cleaning process for clothes). From the survey emerged that this situation brings the people to prefer online shopping instead of traditional shops. Making a comparison of online purchases before, after, and during the lockdown, it is possible to observe (Figure 5) that the Z-Generation respondents had a great increase in online shopping. Pre COVID-19 the percentage was very small but, on the contrary, during the lockdown phase, many of them have decided to purchase in that way. The important data is that at the end of this period, the number of people shopping online decreased compared to Phase one but still increased compared to before the advent of the pandemic.

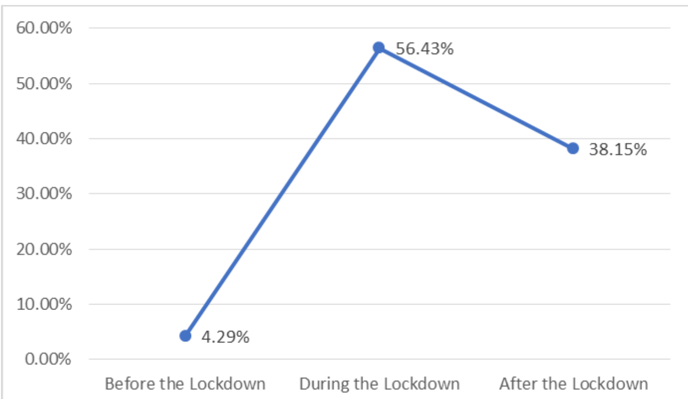

Figure 6. Percentage of online customers

Considering the 38.15% that have affirmed to purchase online also after the lockdown it is interesting to analyze their motivation. The 37.58% said they had an excellent experience in quarantine and therefore want to repeat it, while the 36.97% affirmed to prefer to shop online to avoid queues and imposed rules to respect into the shops.

Finally, 13.33% attested that due to Covid-19 they are afraid of being infected or of infecting someone and for this motivation, they prefer not to go in-store to buy clothing. The remaining 61.85% said they no longer shop online and prefer to shop in-store. Of these, 60.80% emerge who still prefer to see and touch and try the products they will wear.

Another very interesting element is the frequency with which clothes are bought, in fact, the respondents stated that they bought less than in comparison to 2019 (in an absolute sense) and that they had focused on cheaper items. In addition, there was a sharp decrease (-50%) in the clothes used to go to work or for study reasons.

Sustainability and fashion industry: hypothesis testing

The role and importance of sustainability are investigated in the survey concerning the current pandemic period and for future purchase decisions. We have asked, with a dichotomous question if, in their opinion, the role of sustainability in their purchasing decision, concerning the clothing sector, will increase in the future. To analyze this aspect was used the Hypothesis Testing for the Difference between Two Proportions. A statistical test provides a mechanism for making quantitative decisions about a process or processes using a null hypothesis and an alternative hypothesis (for further information see Raftery et al., 1995 and Wild and Seber, 1993). The following tables show the results, on Table 1 it is possible to have tested and result for gender, in Table 2 for generation.

Table 1. Hypothesis testing Gender

Gender Hypothesis Testing (Female-Male)		
Gender	Sample (N)	Mean
Female	430	0.7
Male	223	0.6
Test Result	2.57 (p-value 0.01)	

Table 2. Hypothesis testing Generation

Generation Hypothesis Testing (Z-Generation – Others)		
Generation	Sample (N)	Mean
Z Generation	443	0.8
Others Generations	210	0.7
Test Result	2.83 (p-value 0.004)	

From the results of the tests, there are important pieces of evidence; in fact, in both cases, the values of the tests are statistically significant. This means that the segmentation of the sample, both by gender and by generation, has different perceptions regarding the role of sustainability in their future purchases. Considering the gender, from the sample it is possible to underline that females have a greater propensity to buy sustainable clothes. While considering the comparison between generations it is possible to affirm that the Z-Generation respondents consider sustainability more relevant for their future purchases than the other part of the sample.

Discussion and conclusion

The pandemic has rapidly changed both habits and purchasing intentions in a huge number of areas in the world. A relevant number of economic activities have been negatively affected by this global event, which has aggravated employment and worsened the financial situation of companies. In the period of strict lockdown, due to the limitations and restrictions imposed by Governments, several non-essential economic sectors had to close. In this scenario, consumer behavior was investigated, focusing on the Z-Generation, concerning the purchasing decision of fashion industry products.

The analysis shows a clear change in purchasing decisions between the pre and post-pandemic event. The use of e-commerce was widespread, albeit to a limited extent, the current situation has encouraged these forms of purchase to the detriment of the others. As emerged from the collected data, a significant percentage (with an increase greater than 30%) of respondents decided to buy even now online and not go to the shop for various reasons (mostly for personal health). One of the other aspects that emerged is the contradiction of sustainability. In fact, the Z-Generation sample expresses attention to the topic but this was not found in the survey data.

Only a small part of respondents buys used clothes and use services that can potentially be connected to the concepts of sustainability and circular economy. Considering the business environment, it is important to increase e-commerce services, making information more usable for users, increasing the availability of clothing, and providing a faster and more efficient delivery service.

The role of sustainability in future fashion purchasing decisions is perceived differently on the different parts of the sample with quite clear results. In fact, female respondents have greater consideration and consider sustainability even more relevant, compared to male respondents. In addition, the Z-Generation also gives greater importance to sustainable fashion in the future than the rest of the sample. Concerning these results, it is possible to affirm that, for the considered sample, there is a gender-generation difference in the future purchasing decisions and sustainability. The results of this work need to be considered as a preliminary study that is representative of reality (the Z-Generation) and a well-defined geographical and temporal context. For this reason, it would be interesting to investigate further, with a second survey at the end of 2021, to verify if other changes regarding choice decisions within the fashion industry in Italy have occurred.

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