



A Brave New World

A look at how the pandemic is shaping our world and the fashion industry



In this report



1.

LOCKDOWN LESSONS

A look at how our lives have changed and how fashion brands have responded in the face of the pandemic.



2.

UNDERSTANDING CONSUMER BEHAVIOUR & SENTIMENT POST-LOCKDOWN

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



3.

PLANNING BEYOND THE LOCKDOWN

Understanding the key actions that a brand 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



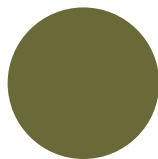
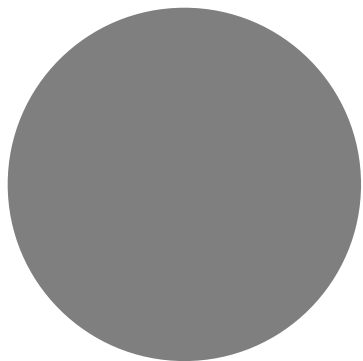
Use of audience insight tools and analytics to understand consumer behaviour and attitudes at different stages of the pandemic



A short consumer survey launched via google survey and LIVA's social handles to gauge what consumers have to say about the new normal



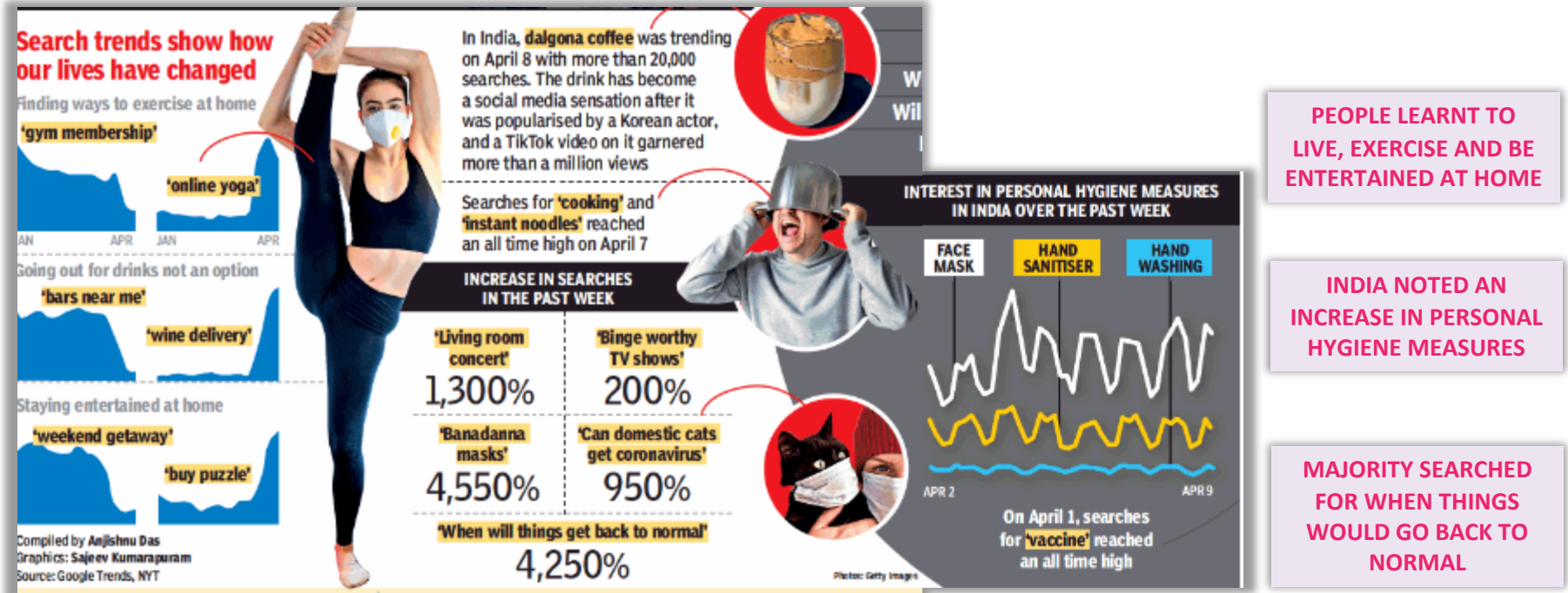
Use of google search trends and google reports to uncover the latest insights about today's consumers



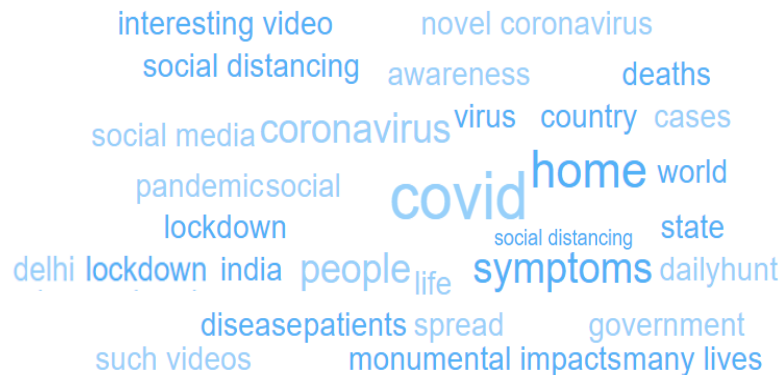
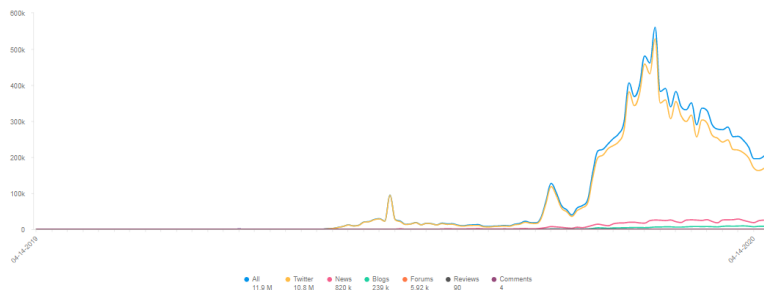
LOCKDOWN LESSONS

Study was initiated by Birla Cellulose for Brand Liva in
collaboration with MRM

As the pandemic gripped the world, search trends show how our lives had changed



Indians responded with active conversations around staying home, social distancing and preventive measures



Geo: India

Source: Meltwater

Time Frame: Jan – April 2020

Total Mentions

11.9M

↑ 2279351%

Compared to previous period

Mentions/Day Average

32.5k

↑ 2278120%

Compared to previous period



Sachin Pilot
@SachinPilot

I request everyone to look after themselves in these challenging times. Stay home as much as possible, keep yourself and your family safe. If you experience symptoms like cough, cold, fever, consult a doctor immediately and self isolate yourself. Take care, be safe.
#Coronavirus

10:15 AM · Mar 22, 2020 · Twitter for iPhone

923 Retweets 7.8K Likes



Pinarayi Vijayan
@vijayanpinaray

Elders | #COVID-19
Older adults are at higher risk for illness from COVID-19. But it's important that this shouldn't be a cause for stress. Our elderly deserve a life of dignity.

🔗 Ensure Social Distancing

📺 Limit news intake if it causes anxiety

✅ Give mental support

1:57 PM · Mar 25, 2020 · Twitter for Android

1K Retweets 5K Likes



Harbhajan Turbanator
@harbhajan_singh

No religion.no cast, only humanity..that's what it is.. stay safe stay home..spread love not hate or virus.. let's pray for every single one.. May waheguru bless us all 🙏🙏
🙏🙏 #BeKind #BreakTheChain #coronavirus



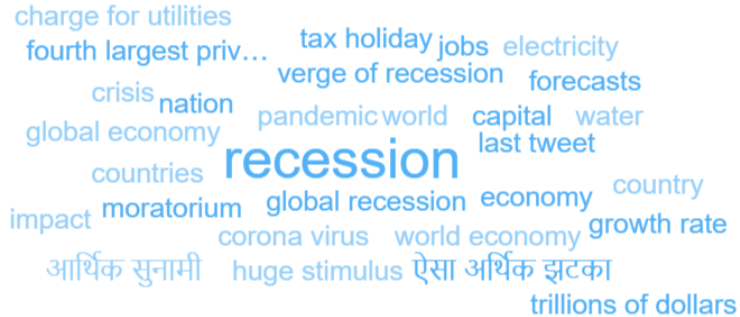
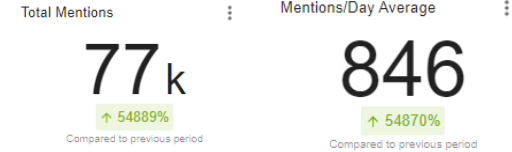
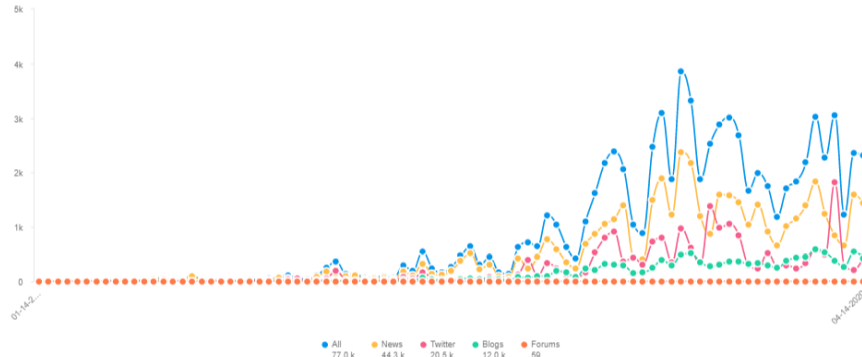
Kajol
@ItsKajolD

In times like these, the only thing that matters is yours & your family's health. A soap, ANY soap is the best way to prevent the spread of COVID-19. And yes, use an alcohol-based hand-sanitizer when outdoors. My appeal to you all is to take the necessary precautions & stay safe!

Study was initiated by Birla Cellulose for Brand Liva in collaboration with MRM

There are rising concerns about the economy

Indians are concerned about the economy – forced leaves, furloughs and a hit on financial markets



Geo: India

Source: Meltwater

Time Frame: Jan – April 2020

Study was initiated by Birla Cellulose for Brand Liva in collaboration with MRM

The screenshot shows a Twitter thread with three tweets:

- Tweet 1:** From National Herald (@NHIndia) mentioning IMF's projection of 1.9% growth for India in 2020, the worst recession since the global economy hit.
- Tweet 2:** From Abhijeet Majumder (@abhijm) discussing COVID-19's impact on the economy, mentioning 'square root', 'recession', and 'recovery'.
- Tweet 3:** From Jay Galla (@JayGalla) stating that Indian stock markets are experiencing the biggest fall in absolute terms due to the coronavirus recession.

The tweets include images of a 'GDP' chart, a burger, and a stock market display.

59 Retweets 289 Likes

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

Impact on Personal / Household Finances

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

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
No impact	11	11	8	12	12	21	23	6	10	12	7	12	2	7	9	9	18	19
Small impact	45	38	37	41	60	41	36	35	38	39	34	38	16	42	24	29	41	36
Big impact	29	26	30	31	22	23	17	43	27	31	33	31	66	32	38	35	21	23
Dramatic impact	9	13	18	9	6	7	9	11	12	11	9	10	15	12	20	10	8	8
Not sure	6	12	7	7	1	9	15	6	13	8	17	10	1	7	9	17	12	14

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

*Using all country data

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

Online Shopping Behaviors

% who say the coronavirus / COVID-19 outbreak has impacted their online shopping behaviors in the following ways

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I'm spending a lot more time shopping online	23	11	20	13	34	10	11	16	10	11	12	6	10	20	19	9	15	17
I'm spending a little more time shopping online	24	19	19	22	33	13	26	15	18	21	18	10	13	27	10	16	22	23
My online shopping habits haven't changed	21	38	30	42	12	33	49	8	29	29	54	25	17	34	23	30	33	37
I'm spending a little less time shopping online	8	6	4	6	8	9	3	11	7	8	3	7	13	5	9	5	9	5
I'm spending a lot less time shopping online	9	7	5	5	6	14	6	20	11	9	3	19	20	4	8	9	9	6
I'm not shopping online	15	19	22	12	7	21	5	30	25	22	10	34	28	10	33	32	13	10

With consumers delaying purchasing clothes in the crisis

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

Delayed Purchases

% who say they've delayed purchasing the following as a result of the coronavirus / COVID-19 outbreak

	ALL	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Car / vehicle	15	12	12	15	16	11	10	23	10	11	3	9	12	9	14	10	12	10
Clothes	27	24	26	25	23	29	18	43	29	33	8	31	35	16	43	33	21	20
Concert / theater tickets	22	17	15	21	26	16	18	24	22	16	13	11	12	19	20	21	21	18
Day-to-day / everyday items	18	15	17	22	12	13	8	30	16	20	10	28	34	10	25	14	14	19
Flights	28	29	30	30	31	17	20	29	43	23	11	32	25	43	28	27	27	22
Home appliances / devices (e.g. TV, white goods)	18	11	16	14	17	12	7	31	13	17	5	15	22	11	25	13	13	9
Insurance	7	4	4	5	7	5	4	14	6	7	3	6	8	5	8	4	5	2
Luxury items (e.g. designer clothes, shoes, fragrances, etc)	21	15	13	14	24	9	9	33	15	12	4	12	18	19	25	14	13	11
Technology devices (e.g. smartphone, tablet, etc)	19	9	16	13	18	12	8	36	11	13	5	14	26	13	23	11	10	10
Tickets to sports events / matches	19	15	12	14	23	9	10	22	20	12	9	9	11	15	22	13	17	15
Vacations / holidays	43	42	30	38	53	36	39	42	51	42	17	42	40	57	35	46	45	34
None of these	21	33	28	30	16	33	39	8	25	25	54	28	15	19	20	26	30	35

Question: Have you delayed purchasing any of the following, as a result of the coronavirus / COVID-19 outbreak?

Coronavirus in India: Apparel brands stare at 50-60% loss in first quarter of FY21

One of the apparel industry's major players has reported a massive loss of 50-60% in the first quarter of FY21. Apparel brands have been hit hard by a wave of store closures triggered by the pandemic.



Covid-19 impact: 1 crore job cuts likely in textile industry without govt support, says CMAI

There could be as many as one crore job cuts in the textile sector due to Covid-19, says CMAI.

BY IANS | UPDATED ON 15 APRIL 2020 11:52 AM



There could be as many as one crore job cuts in the textile sector, which has been severely hit by the ongoing lockdown, if there is no support fund from the government, according to the industry body, Clothing Manufacturers Association of India (CMAI), in a report issued on the government's daily meeting on Covid-19 and textile industry. CMAI, which has around 3,100 members employing over 7 million people, said it has already lost over 100 million rupees in the first quarter of FY21. It has also reported that it has lost 100 million rupees in the first quarter of FY21. It has also reported that it has lost 100 million rupees in the first quarter of FY21.



Indian designers on the challenges of keeping brands afloat amidst the coronavirus pandemic

BY RAJESH KUMAR
17 APRIL 2020

As brands look at ways to survive in a market where production and retail sales of new designs have stalled, designers are looking for ways to survive in these challenging times.



*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

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.



20.5M

Mentions

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.



6M

Users

NEW COLLECTIONS LAUNCHED WITH A HOME SHOOT

Armani halts fashion production to make medical overalls.

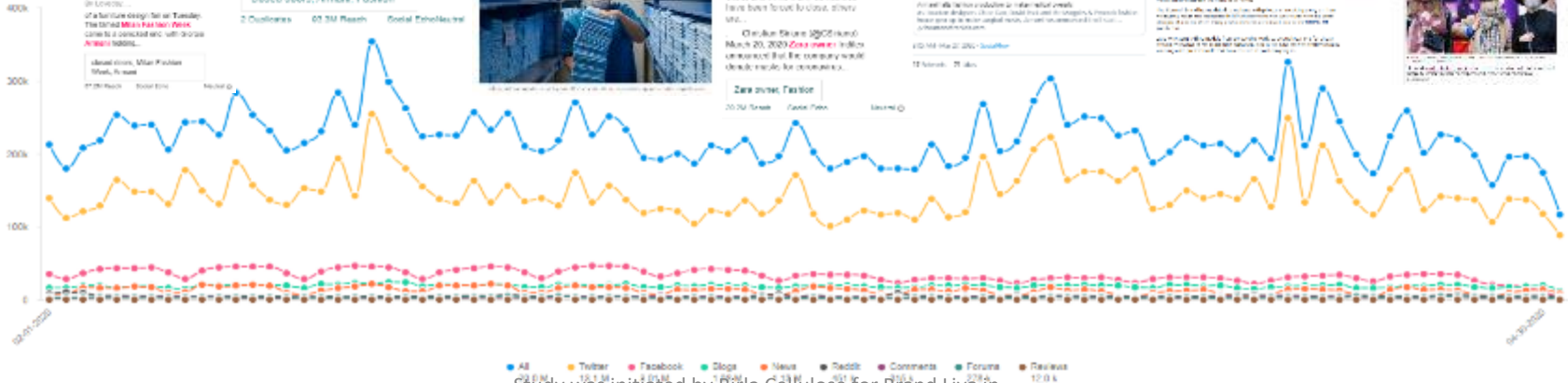


Zara models launch a new collection with a shoot taken at home.

From a studio to a couch, Zara models photograph their new look at home in DIY shoots during lockdown to promote the retailer's new collection.

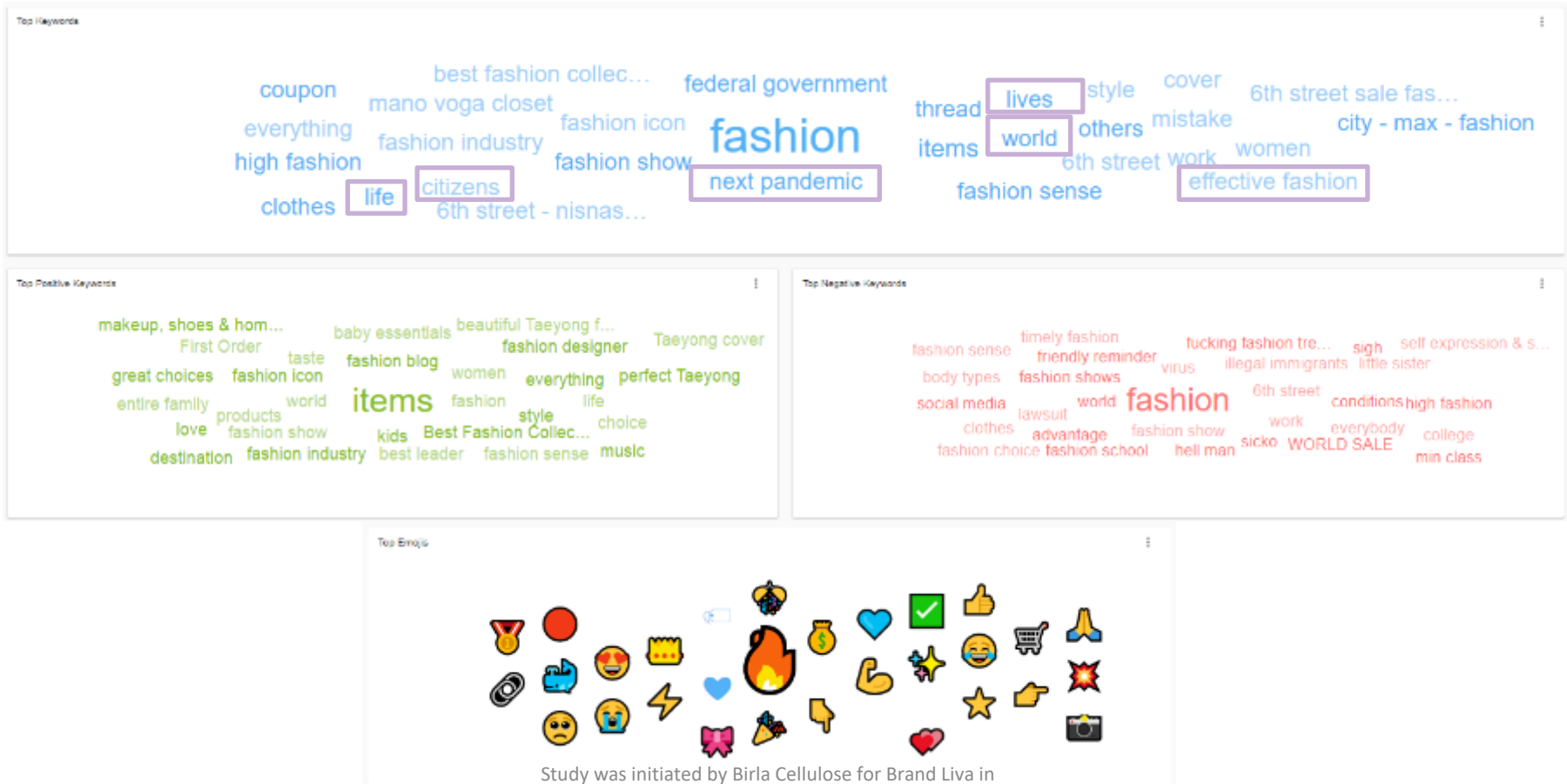
FASHION WEEKS IN JUNE TO GO ONLINE

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

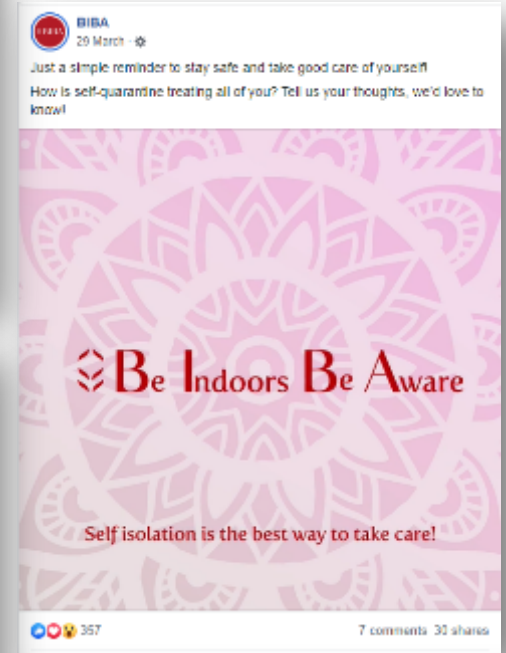
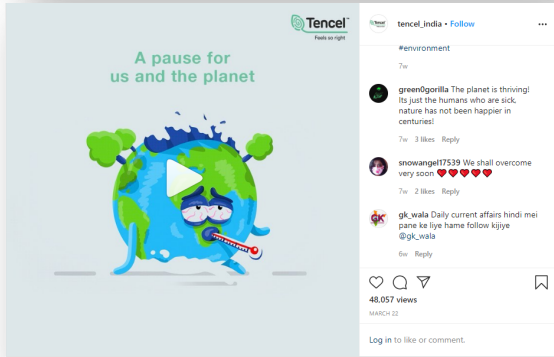
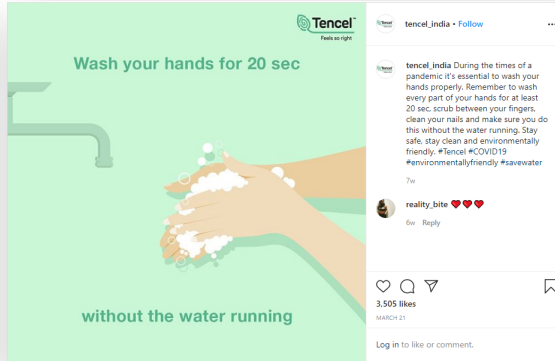


Study was initiated by Birla Cellulose for Brand Liva in collaboration with MRM

Initiatives by fashion giants in support of the pandemic resulted in positive sentiments



Closer home, with the nation talking about staying home, hygiene measures and the positive impact on environment, fashion brands too joined the conversation



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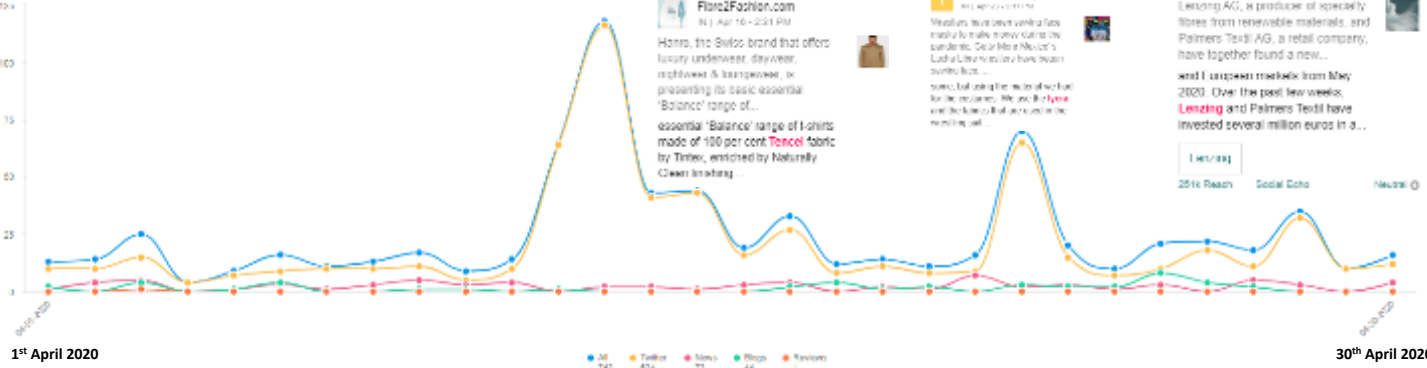
Conversations for competition brands in April reveal efforts to fight coronavirus or innovations such as 'Naturally Clean finishing' which focus on sustainable fashion

Conversations Buzz: Timeline

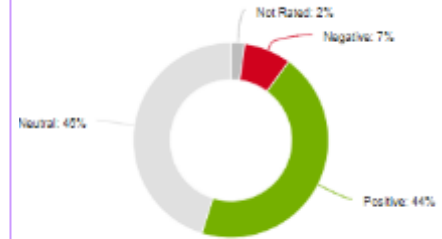
Hanro, the Swiss brand that offers luxury underwear, daywear, nightwear & loungewear, is presenting its basic essential 'Balance' range of t-shirts made of 100 per cent Tencel fabric by Tintex, enriched by Naturally Clean finishing.

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

Lenzing and Palmers join forces to fight coronavirus



Sentiment

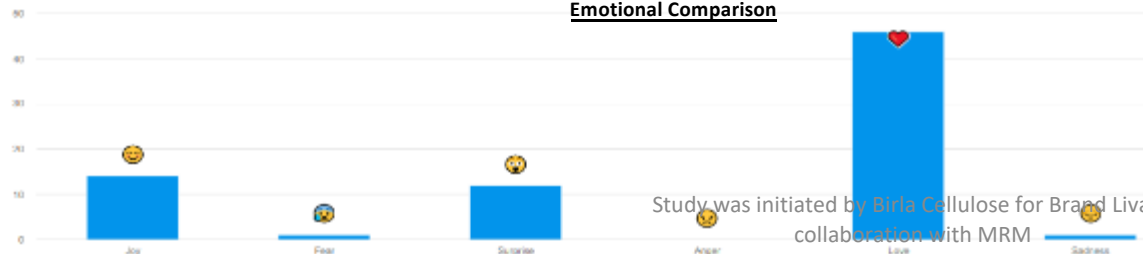


Slight dip in the conversations from the past month.

Stories around, pandemic support and various initiatives were being taken by brands across the industry.

Lenzing and Palmers join forces to fight coronavirus

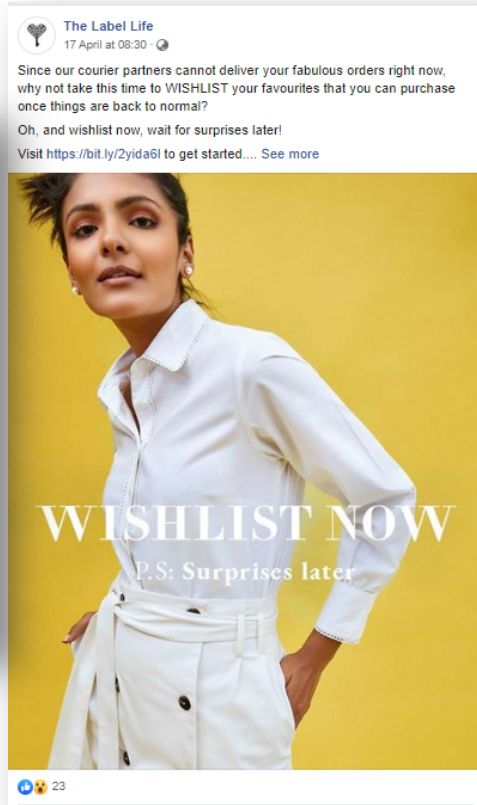
Emotional Comparison



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

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And with Indians staying home, 'WFH wear'- a new opportunity was born, while the 'Wishlist Now' options kept consumers engaged with future fashion purchases



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“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

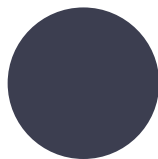
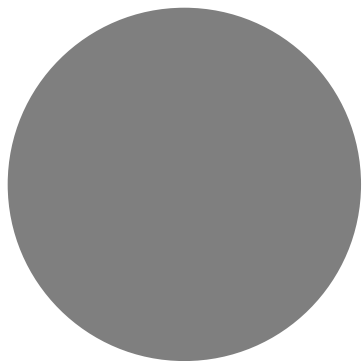
Brands stayed away from self-serving communication

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

Approach 1: Direct response. Do good through efforts to combat Covid-19

Approach 2: Educate consumers with public health messages or sustainable fashion

Approach 3: Repurpose Spring Summer or the recent collection to 'Work from Home' Wear



UNDERSTANDING CONSUMER BEHAVIOUR & SENTIMENT IN THE POST LOCKDOWN WORLD

Study was initiated by Birla Cellulose for Brand Liva in
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Consumer Sentiment Survey Details

- Women and Men: 79%:21%
- Below 18 years to above 55
- 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

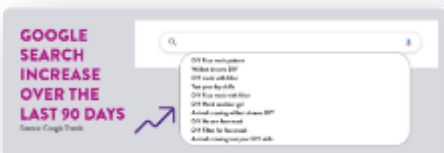


People have adjusted to new ways of living and are learning to cope

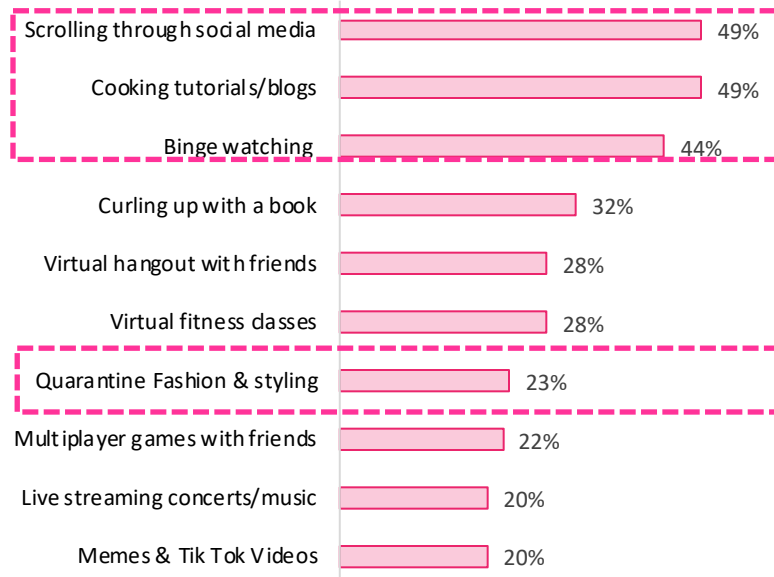
In India, social media is their window to the world and connections, cooking keeps them happy and binge watching keeps them entertained. New behaviours which may stay for awhile post lockdown

*“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.**”*

Source: Think with Google



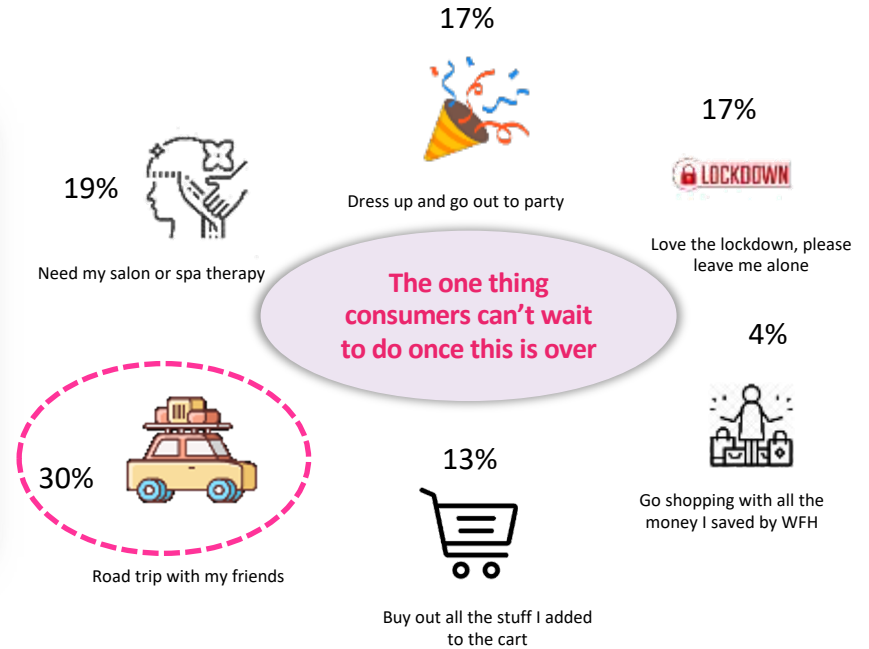
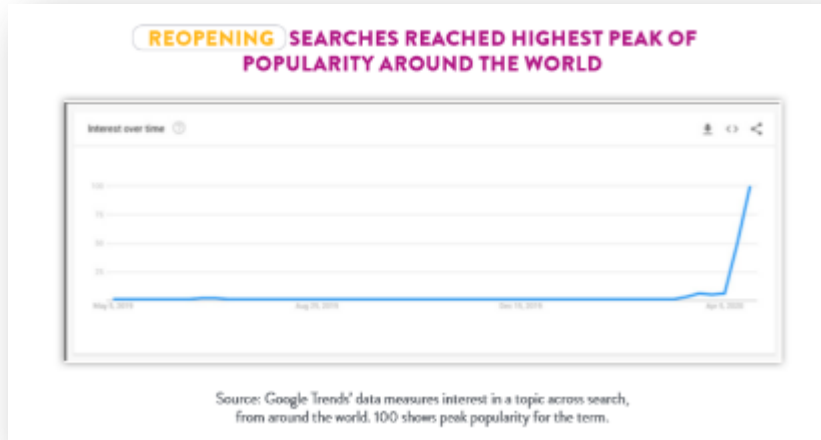
Consumer's Go-To solution for boredom this quarantine



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

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



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

Globally too, Road Trips are a trend to watch out for

Study was initiated by Birla Cellulose for Brand Liva in collaboration with MRM



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

	AI	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

Source: Global Web Index, April 2020, Next wave

Cut down on spending on the following experiences



Dining out: 45%



Movie going: 41%



Concerts: 35%



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



Food delivery (26%)



Makeover at salon (23%)



Taking trips (22%)



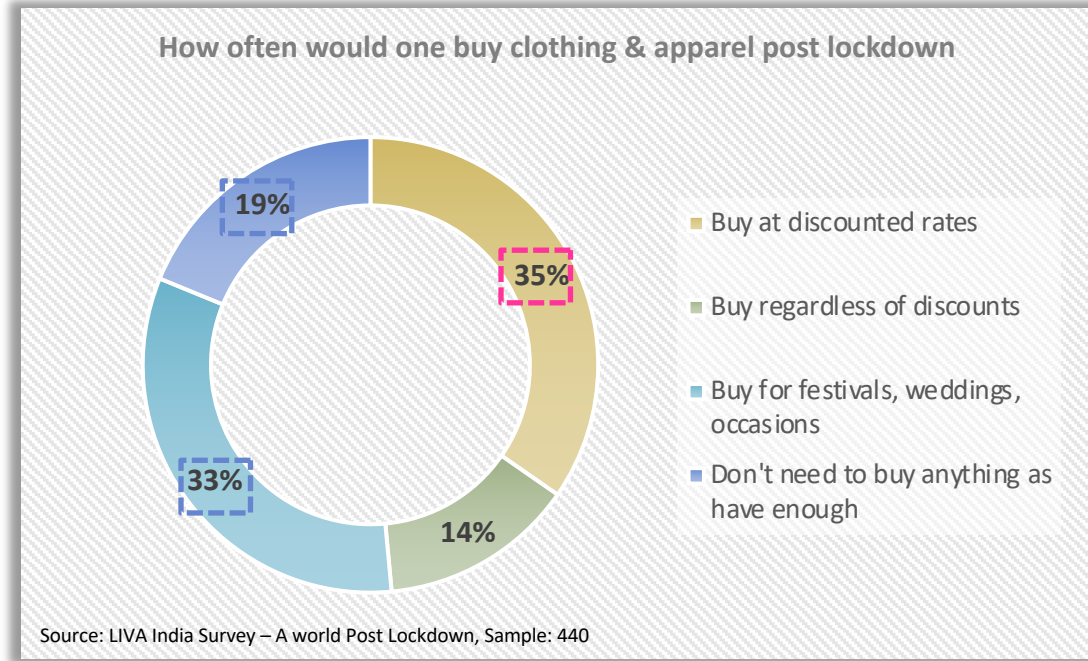
None of the above (16%)

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

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



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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%

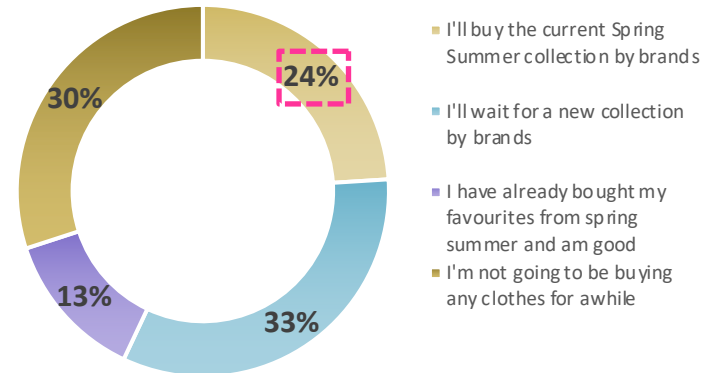


New seasonal collections don't matter anymore 15%



New seasonal collections never mattered to me 36%

Which of the following is true for your next outfit purchase?



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

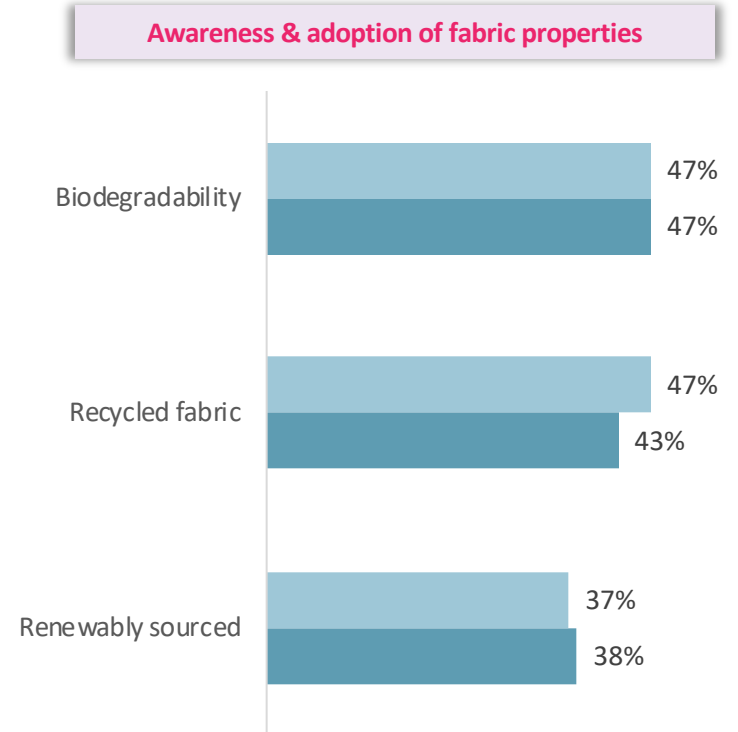
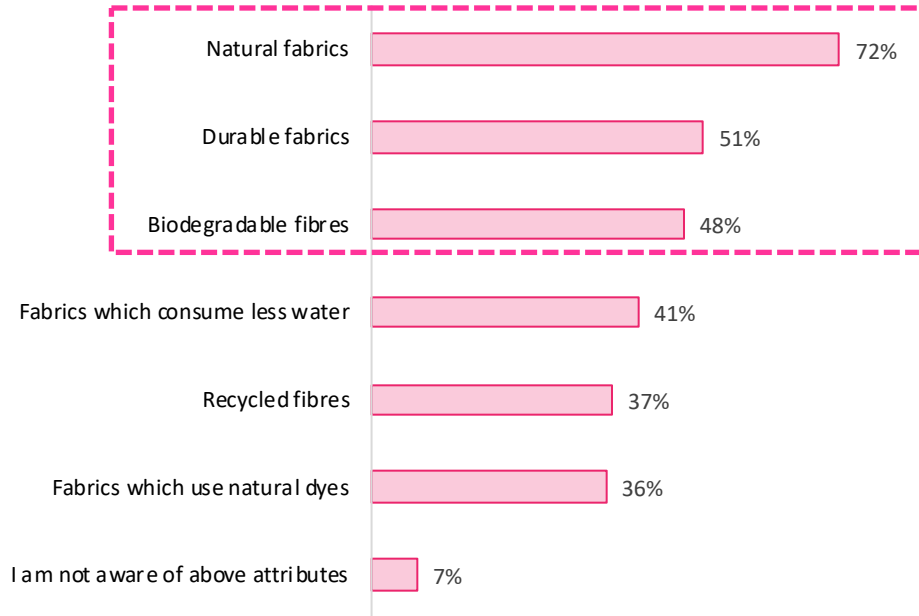


13% would dispose of their clothes consciously for recycling



12% would make no change

As consumers switch to 'responsible fashion', the top 3 attributes they would look for are



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

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

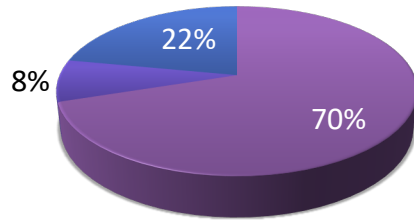
22% say their attitude has not changed greatly

1 in 2 SAY THEIR ATTITUDE TOWARDS FASHION HAS CHANGED

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

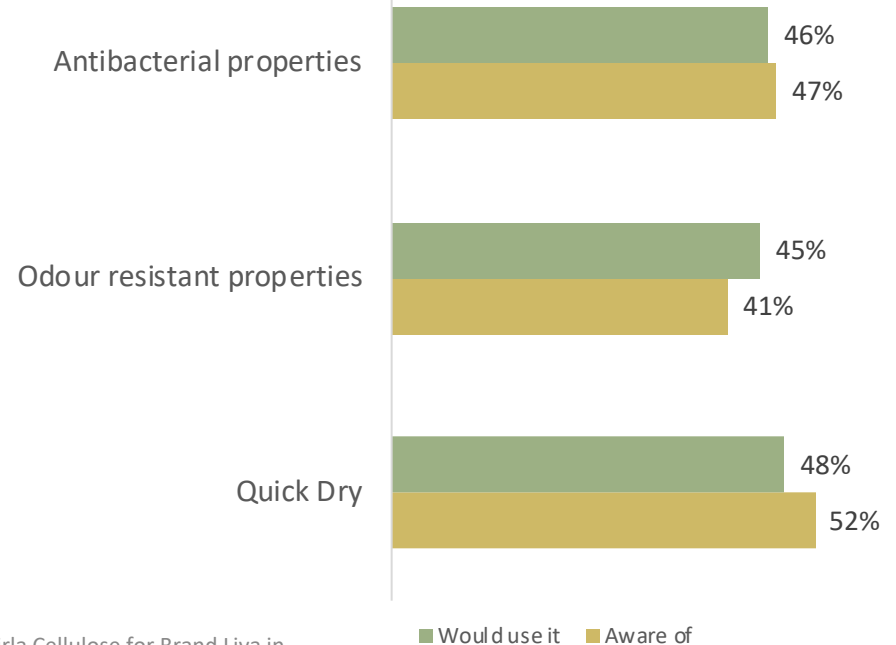
Changing consumer attitudes and needs are going to shape a new dimension of fashion --- fashion which assumes a deeper narrative of wellness

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

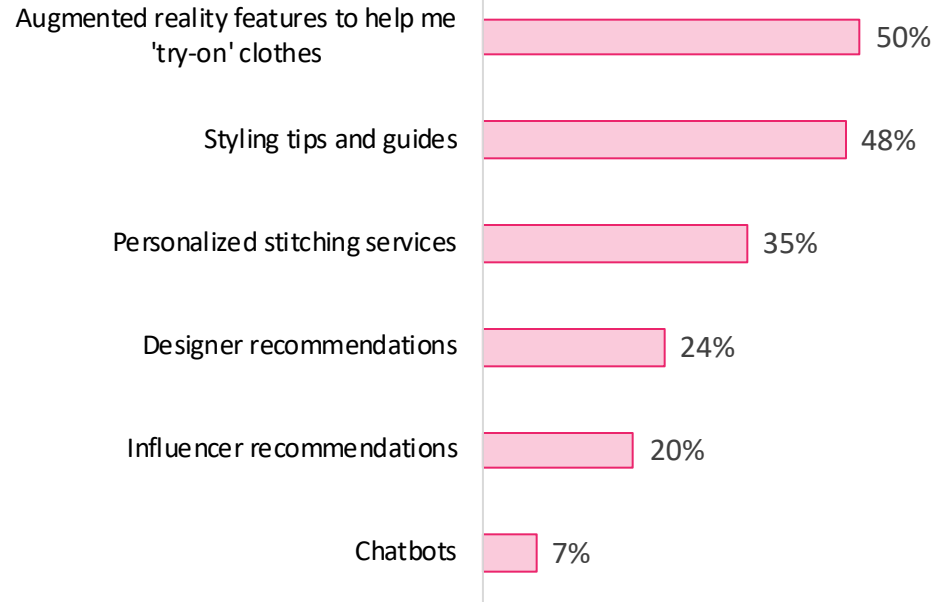


In this changing world, brands would have to reach the consumer where they are, giving rise to digital as the new storefront and experience being the differentiator

Outlook towards retail therapy post lockdown



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 Key Takeaways – A world post lockdown

“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*

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