

Re-contextualizing Retail Strategies for addressing changing Consumer Purchase Behaviour due to Covid19

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Abstract- The three major setbacks of the pandemic, namely, increased health risk, social isolation and economic uncertainty have impacted the way consumers live, work, shop and entertain themselves. The changing guidelines and policies for Covid management pertaining to leisure spending like hotels, restaurants, malls and movie theatres; coupled with restrictions on events of mass gathering like live shows and concerts and social gatherings like marriages have impacted the purchase behaviour. Some of the changes are accelerators of past behaviour while some are completely fuelled by the pandemic but are anticipated to exhibit a linear trend and continue in the new normal. Increase in online purchase, value driven thoughtful spending, preference for local products, eco-conscious purchase choice and changing expectation of customer experience across omni-channel retail are the major factors that are impacting consumer decision journeys while making fashion purchases. These rapid and radical changes in consumer dynamics are crucial for fashion and lifestyle retailers to address through their strategies as they plan to communicate and market to these consumers and cater to their needs and preferences. This study attempts to achieve a better understanding of the significant changes in consumer behaviour due to the impact of Covid19 and the adaptive strategies that should be followed by fashion and lifestyle retailers to stay relevant to the consumers. Descriptive research design was used for the study. A structured questionnaire was used for data collection. The findings derived from the analysis of data and the corresponding suggestions have been provided in the research paper.

Keywords: Consumer Behaviour, Covid19, Change Drivers, Fashion and lifestyle Retail, Retail Strategies, New Normal

I. INTRODUCTION

Fashion and lifestyle retailers provide employment to millions of people. The concept of fashion and lifestyle, today, has expanded to include multiple aspects of human life including clothes, food, travel, entertainment etc. The fashion and apparel companies have already contributed their assets for managing the global crisis by making face masks and hand sanitizers in their factories to meet the consumer demand, donating products to healthcare workers and providing financial aids to NGOs. The non-apparel retailers have also adapted their operations in the light of the “new normal”. However, with the uncertainty pertaining to the end of Covid19, the fashion and lifestyle retailers need to make urgent changes in their business models to secure continuity in the midst of the disruption and minimize the downside.

Some of the key concerns pertaining to the fashion retail sector are listed below:

- Massive Decline in Offline Sales and Consumer Footfalls- falling even to nil due to the retailers shutting the stores as per government mandates for the safety of their customers and employees.
- Online Retail not being able to compensate for loss of offline sales due to reduction in discretionary

consumer spending and lack of backend infrastructure, while there might have been an increase in consumer browsing, the website traffic is not translating into sales in the same proportion. Moreover, fashion retailers with a higher share of in-store sales and physical footprint are finding it difficult to drive the consumer traffic to their online stores and scale up the backend of their ecommerce operations in such a brief period. Online order fulfilment is also becoming an area of concern due to reduced staff because of illness, social distancing norms at different nodal points of the supply chain and closure of warehouses as per government protocols.

- Lower Margin of Athleisure products- although there has been a surge in sales of indoor fashion products and activewear, the market is still at a nascent stage with limited margins, product differentiation and brand loyalty.
- Discounting is becoming exceedingly expensive for retailers- the fashion retailers have been heavily discounting their existing merchandise to the extent that online promotional frequency has reached its peak and the retailers are finding it difficult to come up with differentiated offers to attract the consumers. Moreover, with the increase in online store traffic,

running such discount based promotions is eroding the profitability of the retailers.

The primary drivers of change in consumer buying patterns are acceleration of digitization, economic downturn and uncertainty and major shifts in the preferences both in terms of type and price of products and services with consumers prioritizing saving over spending. The closures of the various platforms consumer leisure spending like restaurants, movie theatres, malls etc. and the cancellation of events of mass gatherings like live shows coupled with restrictions on the social events like marriages etc. have also contributed to major changes in discretionary purchases made by consumers including fashion goods.

The resultant changes can be divided into two segments: a) trends that are accelerations of past behaviour like digital entertainment, online purchase, telemedicine, e-learning and b) trends that have emerged purely due to the disruptions caused by the pandemic. The Covid led changes can further be classified as the ones that will continue as permanent consumer behaviour patterns as a result of habit inculcation even after the pandemic is over and normalcy restored; while some behaviour patterns will be re-evaluated by the consumers on the basis of convenience or experiences and hence are more temporary in nature. The change in behaviour of consumers can broadly be categorized under the following areas of their lives:

- i) Work: characterized by Work from Home remotely, slashing of salaries and loss of employment.
- ii) Education and Learning: signified by remote online learning for the student fraternity and working population too enrolling in online programs for upgrading their knowledge and skills.
- iii) Life at Home: there has been a surge of online activities and internet usage due to work from home, online purchases of essentials as well as fashion products, medical consultation, staying connected with family and friends and entertainment. With restrictions on social gatherings and stringent rules for social distancing, social media platforms and video conferencing platforms became an important channel for social interactions. Nesting at home also implies more time available which is being consumed in entertainment, watching news and focusing on hobbies and health.
- iv) Travel: an increase in domestic tourism due to the travel ban on international destination coupled with discount deals being offered on hotels and other tourism services in India.
- v) Entertainment: shift towards consumption of digital entertainment and proliferation of OTT platforms catering to media habits of the consumers in terms of entertainment, sports or news.
- vi) Shopping: massive rise of online purchases, preference for trusted brands, lesser experimentation, value conscious purchases, sustainable choices, more home

usage compatible product and service choices, decline in discretionary spending, choice of physical stores closer to home and increased importance given to transparency in the products and services offered by the retailers and the Covid preventive measures adopted for hygienic operations.

- vii) Health and Well-being: acceleration of the trend towards adoption of healthy lifestyle. Choice of organic food, subscription of health and fitness based apps, shift towards a healthier routine, increased purchase of medical insurance and investment in medical facilities like e-pharmacy and e-doctor consultations.

In terms of impact on the business, there has been an erosion of consumer trust in brands and they are now more receptive to brands that demonstrate solidarity to the safety needs of the customers as well as their employees, environmental causes and social policies for rebuilding the future. Consumer-Brand relationships have undergone a massive change in perspective with consumers gravitating towards brands that are empathetic and whose values resonate with that of the consumers. The retailers will need to re-examine their strategies for all aspects of the business from product and service whereby ensuring simplification of offering while maintaining brand differentiation, to communication based on personalization, to investment in technology to understand changing consumer preferences and supporting online transactions efficiently and securely and management of logistics in the current context.

The primary aim of this study is to understand the impact of shifts in consumer behaviour so that the retailers can adapt their strategies to future proof their business models.

II. LITERATURE REVIEW

The retailers today are facing massive challenges in adapting their marketing mix to the current realities. Consumers are increasingly nesting at home and this trend is reflecting in their purchase behaviour where they are choosing to focus on more essential purchases with value for money being a key parameter [8]. The various emerging themes of consumer behaviour highlight the feelings of consumer towards brands in the light of the new reality post covid. Retailers will need to use accurate segmentation driven by AI and psychometrics to better understand the needs of the customer groups. A personalized approach to communication as well as product development, inspirational content and sensitive outreach and humanized phygital experiences will be the key drivers of retail success [4].

According to a report by Accenture (2020), consumer priorities are changing being increasingly centred on personal health followed by the health of family and friends which are reflecting in their buying behaviour in terms of preference for 'health conscious purchases', rise in

'conscious consumption' and increasing preference for 'local' [1].

As per a McKinsey report (2020), retailers have to rethink their strategies in terms of product and price mix, channel mix and communication mix. There has been a significant re-composition of the purchase basket of the consumer with greater importance being given to essential products and services like grocery and health. Further, due to lockdown restrictions and fear of getting infected there has been a reduction in the number of shopping trips and purchase of larger packs. The consumers are also becoming less experimental choosing tried and tested brands over the new ones. Reduction in discretionary spending has resulted in more value conscious purchases. The preference for e-commerce has tilted the scales further in favour of online distribution. New channel selection attributes are determining the choice of channel by the consumers like proximity to home, higher standard of hygiene and lesser consumer density and footfalls at the stores [5].

According to another report by McKinsey (2020), the consumer expectations from digital retail channels have increased with respect to speed, safety and accuracy of order fulfilment. In order to adapt their business models to the new and emerging consumer preferences, the retailers need to identify gaps in their operating models and introduce innovations to augment the consumer experience for higher engagement. Moreover, providing safe shopping environment in physical stores will be critical for giving confidence to the consumer to return to in-person shopping at physical stores. Further to de-risk their business, the retailers need to adopt agile and flexible business practices, try to drive traffic to their digital stores and incorporate real time consumer insights to ensure their offerings meet the actual needs of the consumers [6].

Some of the key insights from Orange Business Services report (2020) suggest that The retailers need to re-think their customer journey in the context of the pandemic induced low-touch economy. The customers expect to be kept updated with the store safety protocols and initiatives. Hence, these details need to be highlighted in the websites and social media platforms of the retailers. Consumers are trusting peer reviews more than paid promotions these days and are becoming more discerning. Authenticity and transparency throughout the retail value chain is imperative to retain the trust of the consumer. Consumer centricity is the main paradigm through which all retail strategies need to be evaluated. The operating model and the data architectures of the retailer needs to support the unified omnichannel view of the consumer thereby ensuring both online and offline engagements deliver the expected consumer experience and result in effective business decision making.

Moreover, the retailers also face the additional challenge of re-training the front end workforce with the new skills

needed for the new operating model of physical stores driven heavily by information sharing, technology interfaces and personalized experiences. There will be a significant change in the interaction of the in-store employees and customers in the post Covid world and retailers need to prepare for investing in the re-training to ensure future growth [7].

As per a report by BCG (2021), monitoring the impact of the pandemic on consumer sentiment and behaviour has led to the classification of behavioural changes into 4 categories [2] as under:

- a) Accelerating Behaviours - the consumers rapidly adopted these purchase behaviours during the first wave of pandemic and continue to follow them at an increased pace like purchase of health-based nutritional products.
- b) Sustained Momentum Behaviours - these behaviours exhibited by the consumers have remained at consistently high levels throughout the period of pandemic like OTT subscriptions, digital wallet payments, use of e-commerce etc.
- c) Sensitive Behaviours - these kinds of behaviours tend to rise and fall corresponding to the intensity of the pandemic and the resultant lockdown, for instance, consumers stopping to shop at malls and buying from neighbourhood stores but returning to malls once the restrictions were lifted.
- d) Transient Behavioural Changes - these behaviours were strongly exhibited by the consumers in the first wave of covid, however, they have not gained the same traction during the second and the third wave like DIY, hobby classes, cooking and baking classes etc.

As per Cognizant (2021) report, one of the major impacts of the pandemic on consumer lifestyle has been the significant increase in time that people are spending at home and the various activities they are undertaking ranging from working, socializing to exercising. This in turn affects the demand for the type of product assortment and the way of accessing this assortment by the consumer. Revenue from the digital selling platforms will continue to rise while along with the rise in consumer expectations in terms of immersive and innovative retail experiences. With the consumers demanding the best of physical retail in terms of community vibes, instant gratification of immediate product-in hand, emphatic displays coupled with product touch and feel; and virtual retail in terms customized product curation, access to product information and reviews and safety of shopping from home in the most socially distanced way; the retailers need to concentrate on expanding their omnichannel shopping experiences and order fulfilment that seamlessly blend the two worlds [3].

III. RESEARCH METHODOLOGY

Descriptive Research Design was followed for the study. A sample size of 400 respondents was taken. Quota sampling for equal representation of both genders was followed at 50% each (200 males and 200 female respondents), followed by Judgemental and Convenience sampling. The respondents were chosen based on their interest and exposure in retail to ensure the quality of responses is not compromised due to the lack of awareness of the respondents. The respondents were identified from the cities of Delhi, Mumbai, Kolkata, Chennai and Bengaluru. Research tool used was a structured questionnaire. The questionnaire was administered via online platform due to Covid19 related restrictions. Both primary data and secondary data formed the basis of the research. The primary data collected was analyzed using statistical tools and excel. Based on the results of the primary data analysis and insights of the secondary data analysis, the recommendations were developed.

IV. OBJECTIVES

- To understand the underlying factors impacting changes in consumer behaviour due to Covid19.
- To analyze the consumer sentiments that have major effect on consumer preferences and purchase choices due to the pandemic.
- To suggest retail strategies to target the emerging demands of the consumers and build consumer trust.

V. RESULTS AND DISCUSSION

The summary of the major results of data analysis and the corresponding discussion is as follows:

Preference for Local, Sustainable and Quality based consumption

- 70% respondents are willing to pay more for higher quality products.
- 63% respondents agree to becoming more cautious and value driven while making purchases.
- 76% respondents confirmed that they have switched to more sustainable and organic products.
- 82% respondents claim that they have started giving preference to “local” home-grown brands.

Retailers need to highlight the “local” aspect of their product portfolio. They need to keep in mind the trend towards sustainable consumption and eco-friendly purchases. They need to re-evaluate their product mix to ensure that they cater to the changing product needs of the consumers by including more organic options in their product assortment. The consumers have also reduced their discretionary spending and have become more cautious shoppers. The retailers will need to highlight the right value

propositions in their product or service offerings for gaining consumer attention and trust.

Healthier choices and need for Transparency

- 74% respondents confirm that they have consciously moved towards a healthier lifestyle.
- 68% respondents claim that health is the topmost priority whenever they make any purchase.
- 77% respondents believe that information regarding product composition and transparency in the product value is important for them.

Retailers need to focus on including products in their portfolio that complements this consumer trend. Maintaining product or service transparency will also be a significant business driver.

Increasing inclination towards Digital Retail

- 73% respondents state that they have altered their shopping habits during Covid19, moving from physical retail to digital retail.
- 77% respondents state that large assortment available in online stores gives them multiple alternatives to choose products as per their preference.
- 76% respondents claim that they are more comfortable shopping online than they were prior to Covid.
- 72% respondents state that for some categories of products like basic garments, food etc. they will continue to buy online even after the pandemic is over.
- 68% respondents claim to be omni-shoppers.
- 82% respondents confirm that due to better deals available online for the same products, they prefer online shopping as a means of cost cutting to manage their finances.

There is increased consumer mobility across digital and physical retail channels. The consumers expect the same level of service and satisfaction irrespective of the channel. Since the consumers are increasingly becoming comfortable with online shopping due to both convenience and monetary benefits, the offline channels need to re-invent themselves offering experiences that drive the customers to the physical stores and add to the overall brand value that complement online sales.

Physical store experience

- 67% of the respondents expressed their concern over social distancing measures adopted by the retailers.
- 82% respondents have concerns over disinfection of trial rooms.
- 84% respondents raised concerns about disinfection of tried or returned clothes.
- 68% respondents expressed their concern over Queue Management and Payment Methods.

- 54% respondents who were used to using Digital Customer Service before the pandemic believe that it is more convenient and safe.
- However, overall 79% respondents would still prefer one-on-one interaction for resolving critical grievances.
- 71% of consumers claim that store employees significantly impact their overall customer experience.
- 45% of respondents admitted to missing human interactions when shopping online.
- 63% of respondents would want more meaningful experiences from the fashion retailers.
- 81% respondents are in favour of one-on-one personalized service from the retailers.

The higher risk of infection in socially shared spaces has led to increased security concerns. The fitting rooms and the trial rooms have the most problematic point within the stores. Another key issue for fashion retailers is to provide the necessary safety and formulate policies that result in management of store traffic.

However, consumers still crave for the social interactions and the touch and feel factor of the physical stores. Store employees continue to play an important role in consumer decision journey and impacting the overall perception of the retail store. Consumer expectations from retailers in terms of experiences have also evolved and they look forward to more personalized and meaningful experiences that resonate with their values and sentiments.

VI. RECOMMENDATIONS

The pandemic has caused major upheavals in the context of consumer behaviour with the shoppers rewriting the rules from their pandemic based perspectives as they are faced with a completely different reality. The future of omni-channel retail will be based on the combination of multiple parallel factors. In the current market context, the ecommerce platforms have to provide differentiated offerings to the consumers to keep them glued to the channel while the physical stores will have to start their journey towards financial recovery by strengthening their reputation with the shoppers who have had unpleasant in-store experiences during the pandemic like sudden store closures, lack of product availability, poor level of customer service. On the other hand, the customers too have readjusted their household budgets and priorities and have new considerations that determine their shopping behaviour. Consumers have become more receptive to safer, easily accessible and more convenient retail environments. Confinement fatigue resulting in the desire to return to the new normal, even with the restrictive measures will necessitate retailers adopting new strategies to cater to the consumers.

- I. Analysis of the shifting shopping behaviours and retailers need to maintain connections with their consumers

Fashion and lifestyle retailers need to engage with their consumers in an authentic manner even if they are currently not spending. Retailers need to pursue a location based store reopening strategy based on the pandemic situation in the region with digital engagement with the loyal customers to invite them to stores again and set up policies that will ensure safe shopping environment. Customized strategies for attracting high value consumers should be adopted like invitation to unique experiences, personalization, access to limited edition, exclusive previews. Being aware about the current financial situation of the customer is also important. Hence, detailed consumer segmentation should be carried out.

The consumers will also be returning to a different work environment with remote working, flexible hours and importance on work-life balance. Comfort will be a key consideration for purchase of fashion products and the trend towards 'casualization' will further dictate consumer choices.

Retailers need to carefully analyse the the customer traffic of their digital stores. However, without access to accurate omnishopper data, it becomes difficult for the retailer to track if the digital channel sales have increased due to organic consumer traffic leading to incremental sales or it is a result of the shopper leakage from other sales channel and there has been no increase in overall sales. The retailers need to identify the non-converted or leaked shoppers and work out strategies to prevent leakage by tailoring offerings that lead to conversion. The retailers also need to analyze if the increase in sales is due to greater spending by the existing consumer base or the retailer has been able to attract new consumers. They also should analyse the purchase patterns of the shoppers to understand if they spend more during online purchases rather than when they shop in physical stores.

- II. Catering to increased demand for 'Cleaner, Greener and Healthier' products

Traditionally, the fashion industry has been perceived as insensitive and disconnected to reality contributing to environmental degradation, cruelty and modern slavery. However, due to the several social initiatives taken by the fashion houses during the pandemic the fashion industry in gaining a positive reputation.

Consumers today are supporting products that are chemical free and companies that are environmentally conscious aligning themselves with the values of 'better for me' and 'better for we'. An increasing number of beauty and personal care brands are creating paraben and sulphate free products which are not tested on animals. The eco-conscious consumer is also concerned plastic free, zero

waste and refillable packaging. Although the Gen Z consumers are the biggest champions of clean and sustainable products, the awareness is increasing among older age brackets making the shopper demographics more inclusive.

III. Channel Management

Due to the seamless movement of consumers across physical and digital retail spaces at every stage of the consumer journey beginning with product or service exploration to finalization and ending with purchase, channel management is becoming a key area of focus for retailers to live up to consumer expectations and build brand equity. New operating models of BOPIS, Click and Collect, etc. will require re-strategising the distribution network of the retailers.

IV. Redefining the role of Physical Stores as Experience Centres

Digital offerings need to be combined with unique experiences at the physical stores to create added value and significant USP for the consumers. The role of the physical stores will be redefined as exploration of brand identity and values, platforms where the consumers can understand, engage and revel in the world of the brand and based on their experience, make their purchase decisions.

V. Reinventing Experiential Retail

There was already the rising fashion retail trend towards creating in-store shopping experiences for the consumers that are beyond transactional. Covid has further necessitated the use of AI and AR/VR to deliver personalized and differentiated consumer experiences. With the customer gravitating towards brands that not only deliver quality products but also strive to form emotional bonds that resonate with the ideals and values of the consumers, focusing on consumer experiences will become increasingly important. The creation of hybrid physical-virtual retail models has to be accelerated which offer physical store experiences in digital stores and virtual store benefits are replicated in digital stores. The foundations of deeper shopper engagement like focusing on the discovery experience or curation by way of relatable content or store layouts will lead to increase in share of voice and wallet of the consumers. Retailers should also innovate to bring immediacy in the shopping experience thereby triggering impulse purchases. Further strategies need to be developed for leveraging excitement at the physical and digital stores to build purchase momentum.

VI. Investment in Employee Training for delivering successful Consumer Experiences

Along with the investment in technology, retailers need to focus on the training of customer facing front end employees to provide them the skills to harness and leverage these technologies for successful retail operations

and customer satisfaction. When the retail stores re-open for consumers after the lockdown due to pandemic, the store employees will be experiencing a different way of doing business which they were not accustomed to prior to Covid. There will be greater emphasis on hygiene, multiple changes in Standard Operating Procedures regarding disinfection and customer traffic management which would require training of the staff. They should be trained to use the innovative technologies assess consumer profiles, wish-list etc. thereby providing personalized and memorable omnichannel experiences to the customers. Post pandemic customer behaviour is going to be even more complex and generating and retaining customer loyalty even more difficult. In this context the front end work force will be the greatest asset for positive engagement personifying the values and the identity of the brands they represent.

VII. Focusing on merchandising efficiency to manage costs and deliver real value to consumers

Better merchandise management will lead to lowering of overheads and the resultant benefit can be passed onto the end consumers as better priced merchandise. Fashion retailers should also try experimenting with season-less and gender-less fashion to reduce the wasteful consumption. The consumer wants to find real value in the products they choose to buy. Consumers also will have to be reassured about the authenticity of the products by embedding transparency in the entire value chain. In sync with the trend towards sustainability, fashion retailers should continue to focus on extending the product life cycle through rent and buy back options. Circular fashion should be one of the key focus areas for retailers. Luxury brands can be the biggest contributor to this area due to the nature of their products and their aspirational brand value.

The merchandising plans for the upcoming seasons need to be reassessed in the light of new consumer purchase trends, thereby providing the retailer to explore new business opportunities.

VIII. Striving towards Digital Maturity through investment in technology

Investment in technology has become a non-negotiable for any fashion retailer. However, rather than a knee-jerk reaction to external events, technology adoption has to become a part of core strategy of the retailer. Technology interventions can result in multiple long term benefits to the retailers.

- Accurate product-location information and product visibility through technology based Inventory Tracking can lower the cost and complexity of managing inventory and lead to the creation of a highly flexible omnichannel fulfilment model.
- Managing Omnichannel Fluidity as the consumers are switching between digital and physical distribution channels, retailers need to maintain

real time data on inventory to serve the customers as they shift from clicks to bricks and vice-versa.

- In order to meet the consumer concern for a safe shopping environment, self-checkout systems allows shoppers to avoid any form of physical contact with the checkout staff.
- Supply Chain Management allowing for adjustment to uncertain Market Demands and incorporating Source-to-Consumer traceability. In order to reduce the losses due to excess inventory because of uncertain consumer demand patterns, more detailed granular approach to demand estimation is required for customized product offering to consumers. Product traceability assures consumers about the origin of the products and the way the products are delivered to them thereby bringing about greater transparency in the relationship between th retailer and the consumer.

VII. CONCLUSION

The fashion and lifestyle industry has time and again proved it ability to reinvent and adapt to macro and micro environmental impact factors. The new consumer demand patterns invariably pose a challenge to the retailers to rethink their strategies and realign their processes for a more unified and streamlined omnichannel experience for the consumers. The consumers are seamlessly moving across distribution channels due to the increased accessibility of internet based web technologies and they expect the retailer to also deliver seamlessly across all the channels as per their expectations. The shopping experience has to become more customer driven, data-backed and granular in approach. Retailers will have achieve Digital Maturity to harness the power of data analytics to understand consumer needs and curate differentiated experiences, low cost options for accurate and timely delivery management have to be developed as digital shopping trend further increase and operational efficiencies in terms of merchandise management and re-training of front end staff have to be focused on. Most importantly, the brand's ethos have to be centred around sustainability, transparency, innovation and community experiences with required safety measures; all reflective of the current consumer sentiments. Consumer Commerce is the future of fashion retail and technology will play a very significant role in its revival and survival in the 'new normal'.

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