



ALL THINGS CUSTOMER

EMMA-LOUISE VEITCH

CUSTOMER EXPERIENCE EXPERT





***Coronavirus Impact
Survey:
Clothing & Footwear
Retailers***

1st - 13th May 2020

SUMMARY

1st - 13th May 2020

140 Respondents

Please note; Results are rounded up/down to the nearest whole number

- When comparing how consumers shopped for clothing & footwear before and after the coronavirus pandemic, there isn't much change. For example, prior to the coronavirus pandemic, 45% mostly purchased in shops but sometimes online (compared to 47% when we 'return to normal'). 35% previously shopped mostly online but sometimes in shops (compared to 32% when we 'return to normal'), and 16% said they shopped only in shops (compared with 13% when we 'return to normal')
- Prior to the coronavirus pandemic, when purchasing online, 58% was mostly from non local businesses, 30% a combination of local and non local and 11% mostly from local businesses
- Once we 'return to normal', when purchasing online, 47% will mostly be from non local businesses, 37% a combination of local and non local and 15% mostly from local businesses
- Positively, this will be a 23% increase in a combination of buying local and non local, and a 36% increase for mostly buying locally. This increase in buying locally is hopefully a result of consumers wanting to support local businesses and using some of the local retailers that have started to adapt their business to offer online purchasing and delivery

SUMMARY

- With regards to the frequency of shopping, there isn't much change in the results before and after the coronavirus pandemic. There is a fairly even split between purchasing every couple of months, several times a month, and once a month. Although, most are shopping every couple of months (27% before the coronavirus pandemic, 25% when 'return to normal')
- Currently, during the coronavirus pandemic, 39% are still purchasing, and all these purchases are online
- 81% of these purchases are mostly from non local businesses, 14% are a combination of local and non local, and 3% are mostly from local businesses
- Sadly, this is a reduction in 'currently' using local retailers for online shopping. Before the coronavirus pandemic, 30% was a combination of local and non local, and 11% said their online shopping was mostly local so this is a 53% and 73% reduction respectively
- This could be due to some local businesses being unable to adapt to ordering online/offering delivery and/or being unable to supply the items consumers are currently looking for, such as more leisure/sports wear
- 37% currently don't need anything, and, positively 19% are waiting for things to reopen

SUMMARY

- During the coronavirus pandemic, there's been an increase in purchasing frequency, 38% are currently purchasing once a month, whereas before the coronavirus pandemic it was 25%, so this is a 52% increase
- 67% of consumers feel that the coronavirus pandemic is impacting what clothing/footwear they are currently purchasing. They are...
 - Buying more casual/relaxed style clothing as not going out
 - Buying more sportswear
 - Requiring less work attire
 - Not requiring so many clothes
- 56% are likely to reduce their clothing/footwear spending or delay purchases given the economic uncertainty
- 71% agree or strongly agree in valuing the experience of a physical shop when shopping for clothing and footwear, which does still show the importance of considering an online and offline presence
- 45% think that clothing/footwear retailers customer service/experience has improved during the coronavirus pandemic. For example;
 - Improved and more efficient customer service
 - Adapting by offering online ordering and providing delivery
 - Added value – offering advice, tutorials, blogs etc
 - Quicker response time to enquiries
 - More attentive and more personalised service
 - Reaching out and updating their customers
 - Extending returns timeframes

SUMMARY

- 42% think the coronavirus pandemic will impact what clothing/footwear they will purchase in the future, because they...
 - Will have less money to spend
 - Will be more aware of 'unnecessary items' and 'make do' more
 - Want to purchase more from local businesses
 - Will need less office attire as plan to work from home more in the future
 - Require less going out attire
 - Will give greater thought and justification prior to purchases

- With regards to consumers feeling safe using changing rooms; 37% will use them once the lockdown has lifted, 31% will not use them initially, however, will use them in the future, and 8% won't use them again (22% didn't use them anyway)

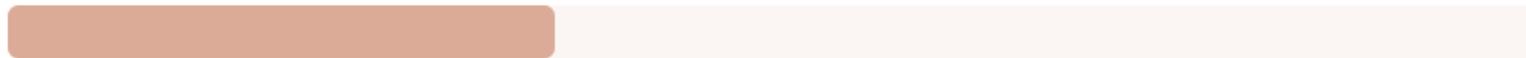
- If businesses can demonstrate high standards of hygiene and cleanliness of clothing and changing rooms then I feel this will help towards consumers feeling comfortable more quickly. Additionally, consider extending your returns timescales so consumers can try items when their home and at their leisure. Although, offering a delivery service so that consumers don't have to visit the shops yet may ultimately be the way to make consumers feel most safe

Before the coronavirus pandemic, how did you buy clothes/footwear?

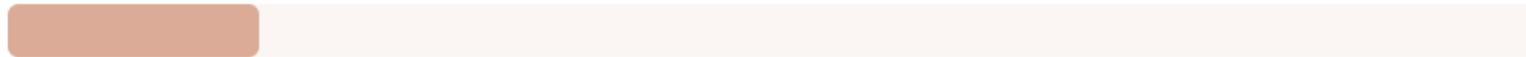
Mostly in shops but sometimes online 45% / 63 resp.



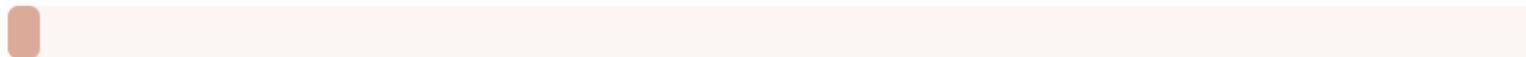
Mostly online but sometimes in shops 35% / 50 resp.



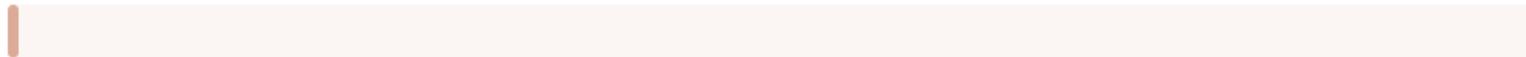
In shops only 16% / 23 resp.



Only online 2% / 3 resp.



Other 0% / 1 resp.

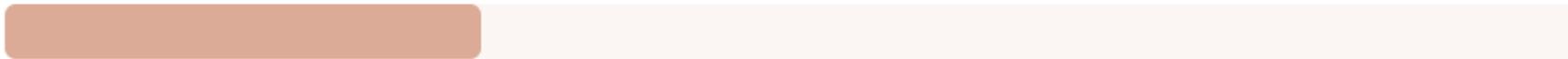


Before the coronavirus pandemic, when you purchased your clothes/footwear online, was it...

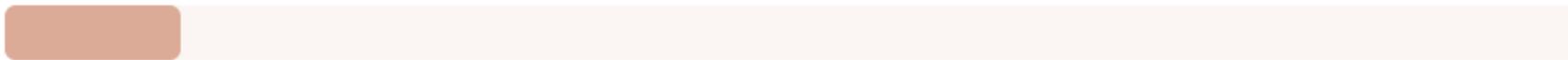
Mostly from businesses that are not local 58% / 68 resp.



An equal combination of businesses that are local and non local 30% / 35 resp.



Mostly from businesses that are local (in Jersey) 11% / 13 resp.

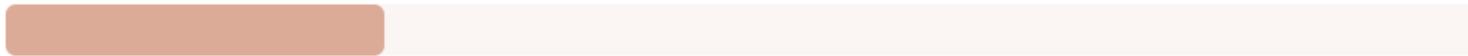


Before the coronavirus pandemic, how often did you buy clothes/footwear

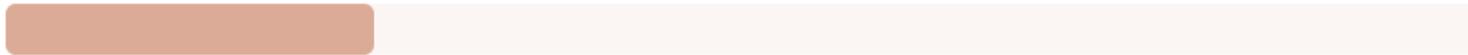
Every couple of months 27% / 38 resp.



Several times a month 25% / 36 resp.



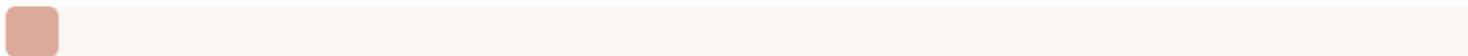
Once a month 25% / 35 resp.



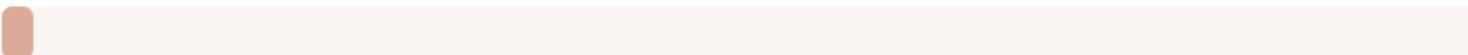
Less regularly 16% / 23 resp.



Once a week 3% / 5 resp.



A couple of times a week or more 2% / 3 resp.

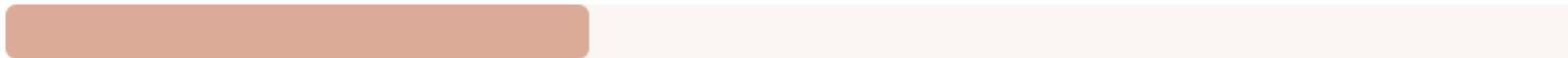


Currently, during the coronavirus pandemic, are you still purchasing clothes/footwear?

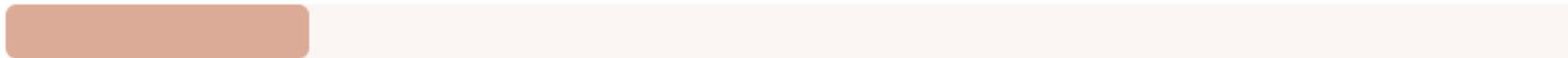
Yes, but only online 39% / 55 resp.



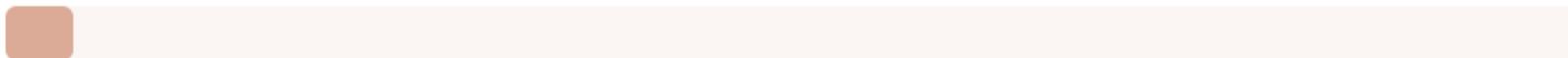
I do not need anything 37% / 52 resp.



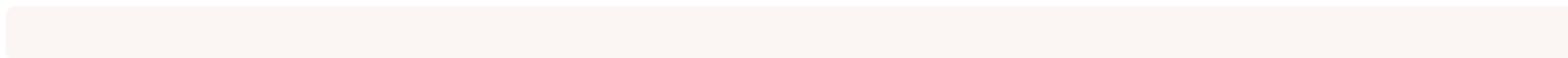
No, I am waiting until things re-open 19% / 27 resp.



No, I am not able to purchase what I need 4% / 6 resp.



Other 0% / 0 resp.



Currently, during the coronavirus pandemic, when you purchase your clothes/footwear online, is it...

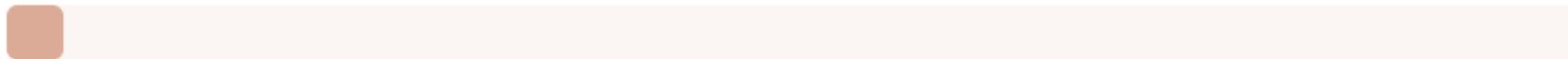
Mostly from businesses that are not local 81% / 45 resp.



An equal combination of businesses that are local and non local 14% / 8 resp.



Mostly from businesses that are local (in Jersey) 3% / 2 resp.



Currently, during the coronavirus pandemic, how often are you buying clothes/footwear?

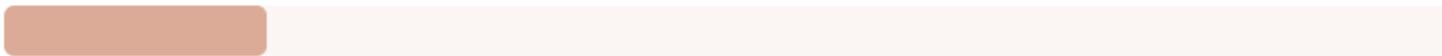
Once a month 38% / 21 resp.



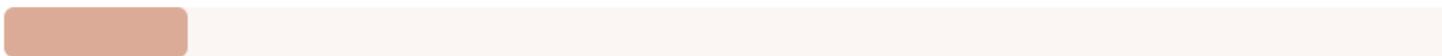
Several times a month 25% / 14 resp.



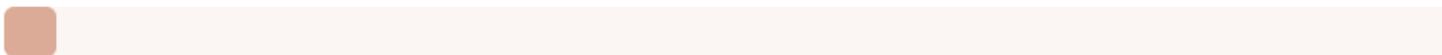
Less regularly 18% / 10 resp.



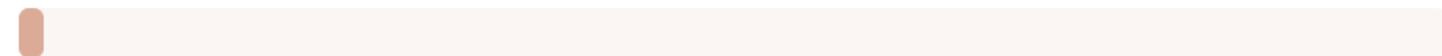
Every couple of months 12% / 7 resp.



Once a week 3% / 2 resp.



A couple of times a week or more 1% / 1 resp.



Is the coronavirus pandemic impacting what clothing/footwear you are currently purchasing?



Please can you explain how the coronavirus pandemic is impacting what clothing/footwear you are currently purchasing? (A few examples)

"Buying more relaxed style clothing as we are not going out"

"I have been buying more sportswear and comfy clothes for home!"

"Clothing - mainly buying loungewear/comfy clothes. Not buying smart clothes/clothes for going out"

"Greater thought and justification prior to purchase, or not purchasing"

"Better to get online. You don't feel safe trying in shops, as other people with virus may have tried on same clothing b4 you"

"Not able to try on before purchase when buying online you have to return if not suitable which is tiresome"

"Not requiring so many clothes"

"Generally like to see what I'm buying before deciding to purchase. Have always struggled to buy online"

"I am not minded to purchase smart workwear (of which I am short of for the summer) because I don't know how long I will be working from home for"

"Not buying work wear (office clothes) due to working from home"

"No formal or "going out" clothes. Joggers!"

"Trying not to spend too much and prioritising what we actually need. Trying to get things locally if possible"

Do you think that clothing/footwear retailer's customer service/experience has improved during the coronavirus pandemic?



Please can you explain why you think that clothing/footwear retailer's customer service/experience has improved during the coronavirus pandemic? (A few examples)

"More personalised"

"Offering online where they didn't before, free delivery etc"

"On the whole I think businesses have made a huge effort to reach customers through social media and online. I think they are making every effort to provide people with items by advertising online and offering home delivery where possible. Larger businesses have extended their return times to accommodate the fact people can't get to the post office"

"Advice, blogs, updates, assisted shopping and stylists being made available, plus discounts and increased return periods for online purchases"

"Online seems a lot quicker"

"More communications and more methods of buying"

"People are adapting"

"Quicker response and greater attention to customers"

"They are having to communicate more with customers due to deliveries"

Once we 'return to normal', after the coronavirus pandemic, are you more likely to purchase clothes/footwear...

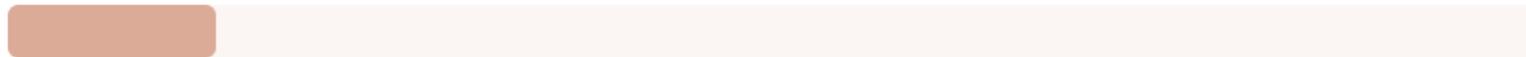
Mostly in shops but sometimes online 47% / 67 resp.



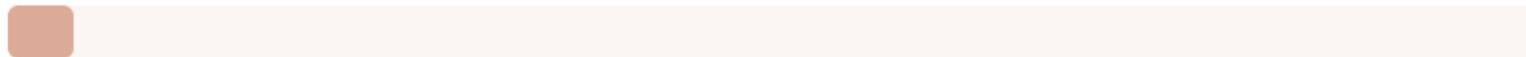
Mostly online but sometimes in shops 32% / 45 resp.



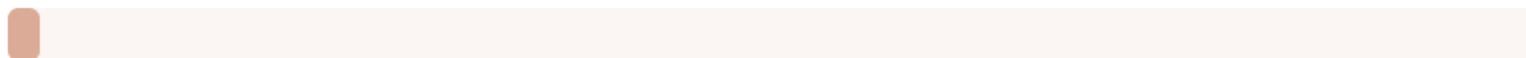
In shops only 13% / 19 resp.



Only online 4% / 6 resp.

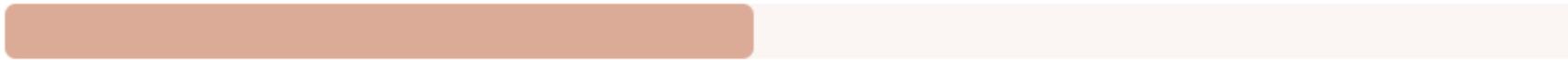


Other 2% / 3 resp.



Once we 'return to normal', after the coronavirus pandemic, when you purchase your clothes/footwear online, will it be...

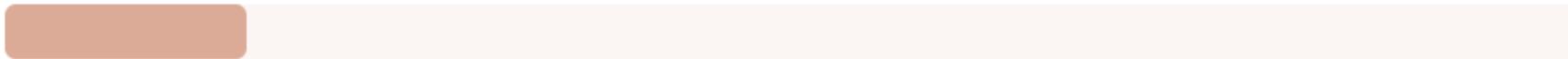
Mostly from businesses that are not local 47% / 56 resp.



An equal combination of businesses that are local and non local 37% / 44 resp.



Mostly from businesses that are local (in Jersey) 15% / 18 resp.



Once we 'return to normal', after the coronavirus pandemic, how often are you likely to buy clothes and footwear?

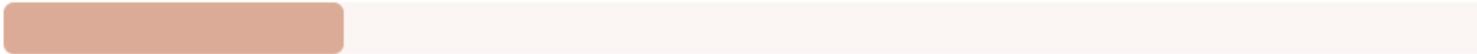
Every couple of months 25% / 35 resp.



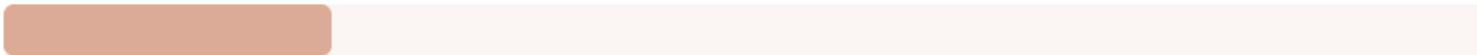
Once a month 23% / 33 resp.



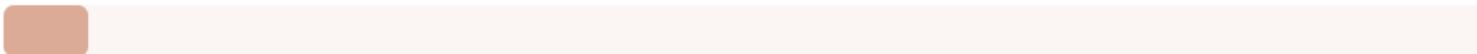
Several times a month 22% / 32 resp.



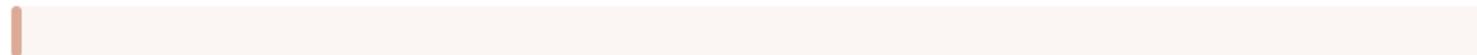
Less regularly 22% / 31 resp.



Once a week 5% / 8 resp.



A couple of times a week or more 0% / 1 resp.

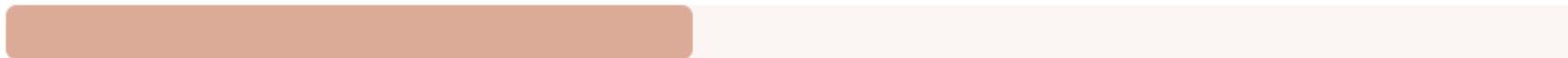


Are you likely to reduce your clothing/footwear spending or delay purchases given the economic uncertainty?

Yes 56% / 79 resp.



No 43% / 61 resp.



Do you think the coronavirus pandemic will impact what clothing/footwear you will purchase in the future?



Please can you explain how you think the coronavirus pandemic will impact what clothing/footwear you will purchase in the future? (A few examples)

"Depends on my financial state"

"Will try to buy more locally"

"What is easily available"

"Would love to buy local but need range and sizing and delivery"

"Prior to coronavirus I was a self proclaimed shopaholic... I would receive multiple packages from online retailers every week and would constantly buy cosmetics in town. The whole situation has made me realise I need to be more cautious with my spending. I should save up and stop wasting money on clothes and cosmetics. I've not made any purchases other than food since lockdown. Its completely changed my view on shopping, I wont be buying anything in future unless I actually need it"

"Less money to spend on expensive items"

"Not being able to afford the normal buying style might have to buy cheaper alternatives"

"Certainly won't be purchasing as much unnecessary items to wear will make do"

"I will not buy as many work clothes due to working from home more regular"

"Will purchase less as made me aware of how much I have"

"I will buy more from local suppliers"

"Less formal more outdoor"

"Less 'going out' clothes"

"I have sorted out most of my wardrobe and realised I have plenty ! and will only buy as and when I really need anything"

"I already try to buy local and also sustainably but going forward I am aiming to limit my shopping in general"

"I guess after 8 weeks of lockdown not just the uncertain economic times ahead would cause me to rethink my expenses, but also the fact that at least in my case, I realised that I don't need as many things I thought I did , so I will try to keep this philosophy from now on"

"It's made me think really hard about what I actually need and what I already have. Children are slightly different as they will always need bigger sizes but I'm determined to only buy shoes/clothes when I really need it"

Will you use changing/fitting rooms once the lockdown is lifted?

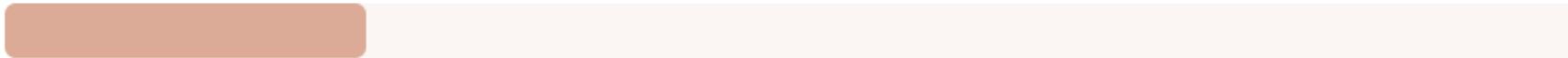
Yes, I will use them like I have always done 37% / 52 resp.



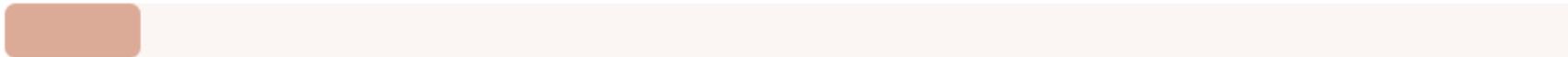
I will not use them initially, however, will use them in future 31% / 44 resp.



I did not use them anyway 22% / 32 resp.



No, I will not use them again 8% / 12 resp.



When shopping for clothes/footwear, I still value the experience provided by a physical shop?

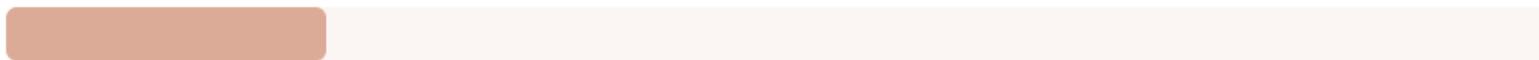
Agree 40% / 57 resp.



Strongly Agree 31% / 44 resp.



Neutral 20% / 29 resp.



Disagree 5% / 7 resp.



Strongly Disagree 2% / 3 resp.



What might a clothes/footwear retailer do as a result of the pandemic that would make you visit/buy from them above anyone else in the future? (A few examples)

"Donate a % of profit to help a start up post CV"

"More photo advertising of clothes footwear to draw you into town"

"Keep their prices competitive"

"Local shops will need to drop their prices, otherwise I will probably continue to buy mostly online"

"Social distancing, cashiers disinfecting pdq machines"

"Be able to view selection online and then go into store to try on before buying"

"Reduce prices!"

"Good customer service"

"Wear mask and keep the distances"

"Offer online shopping and home delivery"

"Have an online order page and delivery locally"

"Ensure changing rooms are kept clean and safe"

"Stock more plus sized clothes and wider fitting shoes"

"Allow easy returns so can try at home"

"Good cleaning routine in stores and contactless by payment"

"I think allowing a small number of shoppers in at time. Perhaps having more space in store to be able walk around more freely without bumping into people"

"I don't think they need to make changes, maybe limit changing rooms and shoppers entering at the start"

"Keep the prices low and quality good"

"Don't over fill rails and less crowded around the till with items"

"Nothing, the high street is dying, the parking is overpriced, the stores are overpriced and I can find everything online cheaper without leaving my house"

"More sizes, bigger range, home delivery if not in stock, speed, easy returns"

"Stock more sizes, continue special offers, continue improved customer service"

"Make the experience safe and pleasurable with cheerful service and a good range of items"

"Offer good value compared to online. It's been surprising how easy it's been to buy online with high street closed. Free return postage makes it easy to return if not the correct size/fit. It's going to be tough for retailers opening up again as ppl will expect a wide choice AND a good price otherwise they will just buy online."

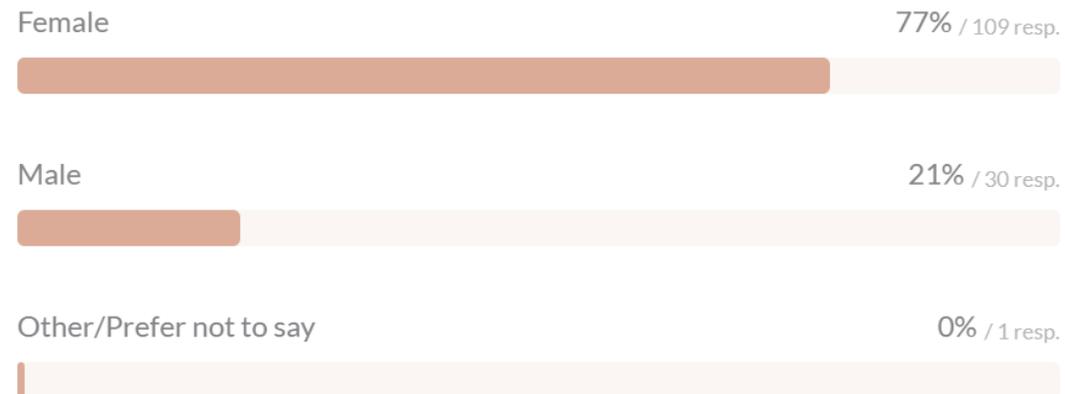
"Perhaps only have one item on display of each clothing. Keep the other sizes in their packaging if at all possible"

Just be polite and friendly to costumers"

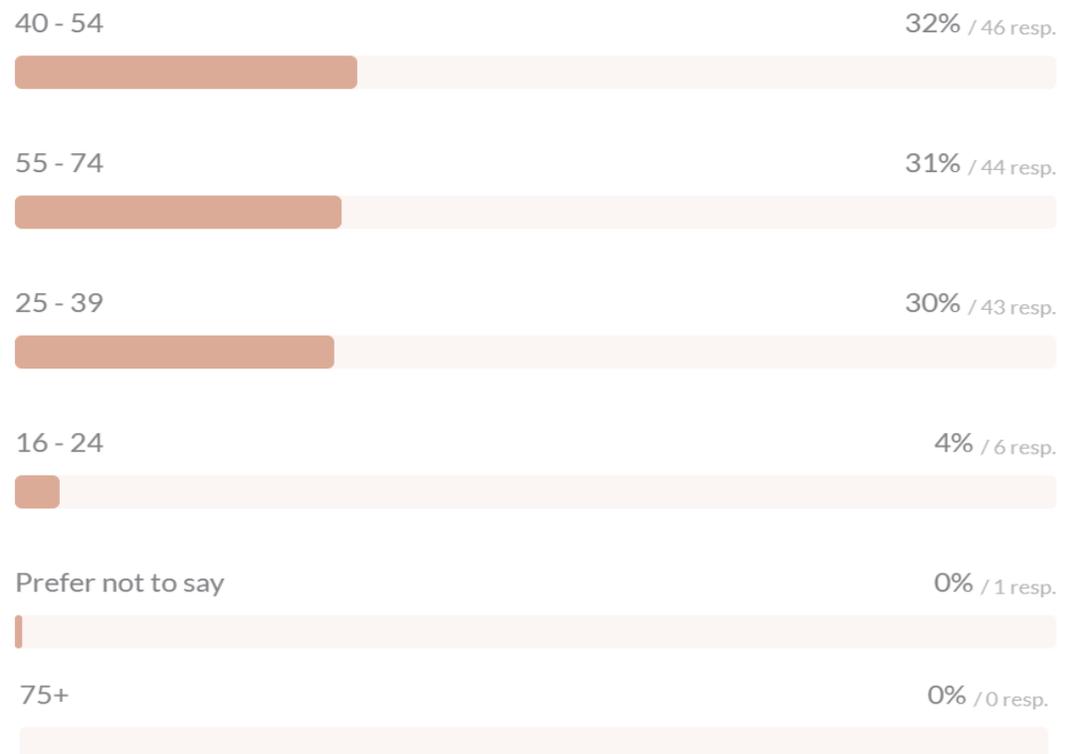
Options to try at home and return"

"The stores in jersey do not offer a good online service - e.g. dept stores. I would have bought from them if their offer were as easy as somewhere like John Lewis"

Are you...



Which of the following age brackets do you fall into?





ABOUT 'ALL THINGS CUSTOMER'

Customer Experience is so important. Happy customers are loyal and tell everyone how great you are. They bring in new and repeat business without you even lifting a finger!

Sounds perfect doesn't it, and it gets better...Happy customers increase profitability.

Are you ready to improve your customer experience...? Great!

Our services find the gap between the needs and wants of your customers and what they actually experience. They'll highlight your successes and show you areas where you can improve.

It doesn't matter what services or products you offer, your size, whether you're online, in store or multi-channel. Using our expertise and passion for all things customer, we'll help you identify any negative experiences, give you the tools to create positive ones and provide solutions to become more customer-centric, thus giving you competitive advantage.

All services are unique to your specific needs, we're all about delivering expertise with a personal touch.

We've spent years analysing and perfecting customer experiences, resulting in improved customer satisfaction, customer loyalty and a reduction in complaints. It's something we're hugely passionate about.

We look forward to doing the same for you.





Emma-Louise Veitch CMGR FCSI Founder and Customer Experience Expert



Customer Experience is something I'm hugely passionate about! It's the reason why I set up 'All Things Customer', I just love helping improve customer experiences.

Having overall responsibility for the development, implementation and management of the Customer Experience strategy for Feelunique, a global online beauty retailer and largest in Europe, is without a doubt a huge highlight for me. Part of this strategy involved implementing a successful customer insights program enabling customer-centric solutions and consistency to be driven throughout the business.

In addition, I've implemented and developed an award winning Customer Service Team alongside the channels/platforms to ensure a best in class customer experience. For this, I was personally recognised at the UK National Call Centre Awards.

I've even been lucky enough to work with a different type of customer...Bats!! Using my event and project management experience whilst working for HSBC, I managed and led the build of the award winning bat tunnel at Jersey Zoo-the first sustainable building of its kind in the Channel Islands and the largest Corporate Sustainability project HSBC has ever taken part in.

Raising money for Teenage Cancer Trust and Jersey Hospice Care, has also been a huge part of my life. It's the reason why I founded the 'Jersey By Invitation Only' annual ladies lunch which has raised in excess of £61,000. I've loved every minute of organising these events and I'm incredibly grateful to these wonderful ladies for their loyalty to this event.

In addition to my wealth of experience, I'm a certified Life Coaching Practitioner and have qualifications in Strategic Management and Leadership for Directors responsible for organisational change and Chartered Fellow status with the prestigious CMI.

I really enjoy being a guest lecturer at Highlands College too, and look forward to helping Highlands more in future.

SERVICES

CUSTOMER
EXPERIENCE
REVIEW

CUSTOMER
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REVIEW

CUSTOMER &
EMPLOYEE
FEEDBACK

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SERVICE
TRAINING

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