

Consumer mindset in a time of crisis: Exploring the role of social media for Gen Z's fashion consumption in 2020

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Background and research aim

The COVID-19 pandemic has accelerated an already ongoing trend in shopping behaviour, shifting consumer preferences towards digital interactions with brands rather than traditional brick and mortar retail. In a period of just eight months, the fashion industry has seen a significant increase in its e-commerce sales in 2020—from 18% to 29%—reaching levels of growth that had not been predicted for the sector until later in this decade (McKinsey, 2020). One driver behind this desire for digital interaction amongst Gen Z consumers—that is, those born after 1995—is rooted in this group's extensive use of social media (Vogue Business, 2020). An additional push factor in 2020, however, was likely the result of directives put in place to contain the pandemic, such as social distancing and phased lockdowns, which saw online communications utilised to compensate for the lack of in-person interactions to maintain relationships, including those with brands (Deloitte, 2020; Hamill, 2020). Fashion brands have

begun to recognise these developments, and the need to optimise and diversify their online experiences through targeted interventions, such as social shopping, live streaming and multimedia customer service offers, to meet the ever-evolving needs of the digital consumer.

Our paper explores the role of social media within the consumer decision process of Gen Z during the pandemic—specifically, how social media are used to discover fashion brands and inform fashion consumption decisions—presenting preliminary results from a pilot study. The pilot study is part of a larger collaborative project between Cardiff Metropolitan University and the University of West London that investigates the ongoing consumption shifts amongst Gen Z.

Study design

For the pilot study, a total of $N = 136$ semi-structured interviews were conducted with Gen Z consumers based in Cardiff, Wales, and London, England, in Q4 2020 (see tab 1). For additional data, a total of $N = 44$ Gen Z volunteers from Cardiff, Wales, were recruited to keep consumer diaries for a period of three rolling weeks during the investigation period (Siemieniako, 2017). Both data sets were transcribed and subsequently analysed using Thematic Analysis (Allen, 2017).

Table 1. Participant details for pilot study in Q4 2020

	<i>N</i>	Gender			Age	
		<i>Female</i>	<i>Male</i>	<i>Non-binary</i>	<i>ø</i>	<i>SD</i>
Interviews	136	104	32	-	20.1	1.8
Consumer Diaries	44	32	11	1	19.8	1.2

Findings

Social media is not enough to complete the customer journey: For Gen Z, social media appeared to play first and foremost a role in the early stages of the customer journey. Accordingly, social media were chosen over a brand's website and online fashion magazines to provide inspiration regarding fashion trends and help with the selection of products (*e.g.*, colour). Purchases, in contrast, were preferred via the brand's main website; with participants largely avoiding social media for this stage of the customer journey. Our data indicate that distrust concerning transactions via social media might be prevalent amongst Gen Z and might have been heightened during the pandemic.

Scrutiny of paid influencers: Recommendations posted by someone outside of one's own circle of friends were treated critically. Gen Z appears to have a distinct awareness of the interconnected relationship between influencers and fashion brands. Whilst particular criticism was demonstrated for recommendations by influencers who, at any point in their careers, had managed to cross over into mainstream media—*e.g.*, as a participant in a reality TV show—, influencers with a well-crafted and clearly communicated value statement that aligned with the current values of audiences, seemed to escape the highest level of criticism. The pandemic might

have increased the scrutiny that influencers are paid by Gen Z, with additional time dedicated to online research on influencers seemingly a common pastime in 2020.

Mix of public content and dark socials: Unsurprisingly, Gen Z utilised different social media for distinct tasks within the customer journey—with Instagram being the only channel used throughout all stages of the recorded journeys. Generally, our data indicate a potential transition from public social media channels to dark social media channels as the consumer progresses through the stages of the customer journey.

Conclusions

Social media have played a pivotal role in the consumer decision processes of Gen Z in 2020, and the pandemic has had a distinct impact on their use—resulting in, among others, increasing distrust and scrutiny amongst potential consumers. Whilst brands should continue to invest in integrated multi-channel activities, to guide consumers smoothly through the customer journey, challenges are arising from Gen Z's withdrawal from public spaces in favour of dark socials for part of their journey. In order to manage the next normal, future market communication campaigns will need to consider this shift and create dedicated interventions for these harder to reach media channels.

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