

Revitalizing Premium Womenswear Stores: Experience-Centric Strategies for China's Millennial Female Consumers

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Abstract

Background: Due to the shift in consumer behavior towards minimizing social contact established during the pandemic, compounded by the lingering economic downturn and the typically higher price points associated with physical stores compared to online channels, the status of fashion brand stores has been significantly undermined. Due to post-pandemic economic downturn, consumers began to reduce or refuse to shop in physical stores, this also has accelerated the development of e-commerce. Therefore, retailers need to respond to people's perpetual shift to online shopping. And if the economic recession continues, the recovery momentum of brand physical stores will continue to be sluggish. This paper aims to provide guidelines on how premium womenswear brands can drive more millennial female Chinese customers into their retail space in China, especially after Covid-19 and the rise of online shopping. This paper analyses and discusses the data and case studies in six related market intelligence reports through secondary research. Although these reports have different investigation directions, they all add to the examination inquiries of this paper. The reports incorporate quantitative and subjective examinations, which can cross-supplement the information and data required by this paper. The research results of this paper show that hedonism and in-person experience are the main motivations for customers to go to physical stores, which cannot be replaced by online shopping, and most retailers also have invested in customer experience and digital retail. Research shows that high-quality customer experience can attract and retain customers and bring profits. Therefore, optimizing the customer experience of physical stores is the best approach for premium womenswear brands to attract consumers to physical stores after the COVID-19, which is also the author's recommendation to premium womenswear brands.

Keywords

Physical Stores; Retail Design; Customer Experience; COVID-19 Impact; Chinese Millennials Female; Premium Womenswear Brands; Consumer-centric; Crisis Management; Retail Innovation and Digitalization.

1. Introduction

Due to the shift in consumer behavior towards minimizing social contact established during the pandemic, compounded by the lingering economic downturn and the typically higher price points associated with physical stores compared to online channels, the status of fashion brand stores has been significantly undermined. Due to post-pandemic economic downturn, consumers began to reduce or refuse to shop in physical stores, this also has accelerated the development of e-commerce. Starting from early 2019, the penetration rate of the Internet has reached 53% globally, and the rate of households smartphone has reached a new height of 72%. In 2021, it is predicted that there will be more than 2.14 billion customers who purchase merchandises and services on the web, which is more than ten times of the scale 166 million in the year of 2016, therefore e-commerce has become an important channel and methods of interaction with customers, which continues to grow, making the retail industry embrace an

enormous success in the world. According to the retailing trend report, the worldwide retail industry is worth \$15.2 trillion. In 2020, e-commerce is transforming into the greatest channel among all, accounting for 15% of sales. By 2024, the percentage has already exceeded 20%. Moreover, due to post-pandemic economic downturn, consumers began to reduce or refuse to shop in physical stores, this also has accelerated the development of e-commerce, which makes the situation worse. Therefore, retailers need to respond to people's perpetual shift to online shopping. And if the economic recession continues, the recovery momentum of brand physical stores will continue to be sluggish. After the crisis, with the continuous attention to health and the high tension of economic recession becoming the focus of their attention, consumers will take inventory and freeze spending, while consumer sentiment is at the lowest point in history, which is particularly serious for the fashion industry due to the randomness of clothing purchase. Consumers will make changes, such as increasing working from home, participating in virtual activities, and demonstrating new shopping behaviors, especially from offline shopping to online shopping, which means that post-pandemic reset consumer behaviors and priorities, and support the consumption mode focusing on self and good physical and mental health.

Along these lines, Retailers should react to individuals' never-ending movement to online purchases. Then again, physical area is where brands build up genuine contact with customers. In spite of the fact that internet business improves clients' desires, only 33% of clients feel that web based shopping is more advantageous than physical stores. In the design business, over 70% of buys are still disconnected, and customers' interest for comfort and close shopping is likewise developing. This shows customers despite everything need bricks and mortar. 83% of worldwide customers imagine that stores are significant on the grounds that they can see and contact merchandise. 78% of customers feel that the charming in-store air is a significant purpose behind them to pick physical stores as opposed to internet business. Boston Consulting Group has found that brands which attract customers emotionally have advantages, by mobilizing all of the five senses together with employees and services, brand experience will be better. Therefore, physical space is the most effective way to establish emotional connection with customers. As the necessity of hoarding necessities in shops is reduced, shopping as a way of socializing, entertaining and discovering new things has begun to flourish, which also shows the importance of brand experience.

And retailers of physical stores ought to think about the administration, accommodation, and experience to address the issues of purchasers. Therefore, post-virus, fashion retailers still have a great opportunity to attract customers who are used to shopping online back to offline.

Moreover, as indicated by figure 1, China turn into the fastest developing retail market, which is relied upon to represent 30% of the business' outright deals development and is anticipated to form into the greatest retail market in the following 10 years in the world. In 2019, Chinese shoppers represent 90% of the development of the worldwide market, see Figure 2, and by 2025, Chinese customers will represent 46% of the worldwide market.

And from 2018 to 2025, the population of upper-middle-class families in China will develop at a compound yearly rate of 28%, bringing the total number of families with monthly income between US\$ 2,600 and US\$ 3,900 to 350 million, meanwhile, the wealthy class in China families with monthly income exceeding US\$ 3,900 will nearly triple to 65 million. It is estimated that China will account for 65% of the global extra consumption by 2025. This means that Chinese people have enough purchasing power for premium products. Almost all of the incremental growth of China's premium market comes from the millennials. In China, more than 70% of millennials have positive financial prospects, which is the driving force behind luxury goods demand in China. They have more than 10.2 million luxury consumers, of which females spend far more than males. Therefore, Chinese millennial female consumers are the most promising

and important consumers in fashion brands. Furthermore, according to McKinsey's survey, these Chinese consumers prefer buying premium fashion products offline, see Figure 3.

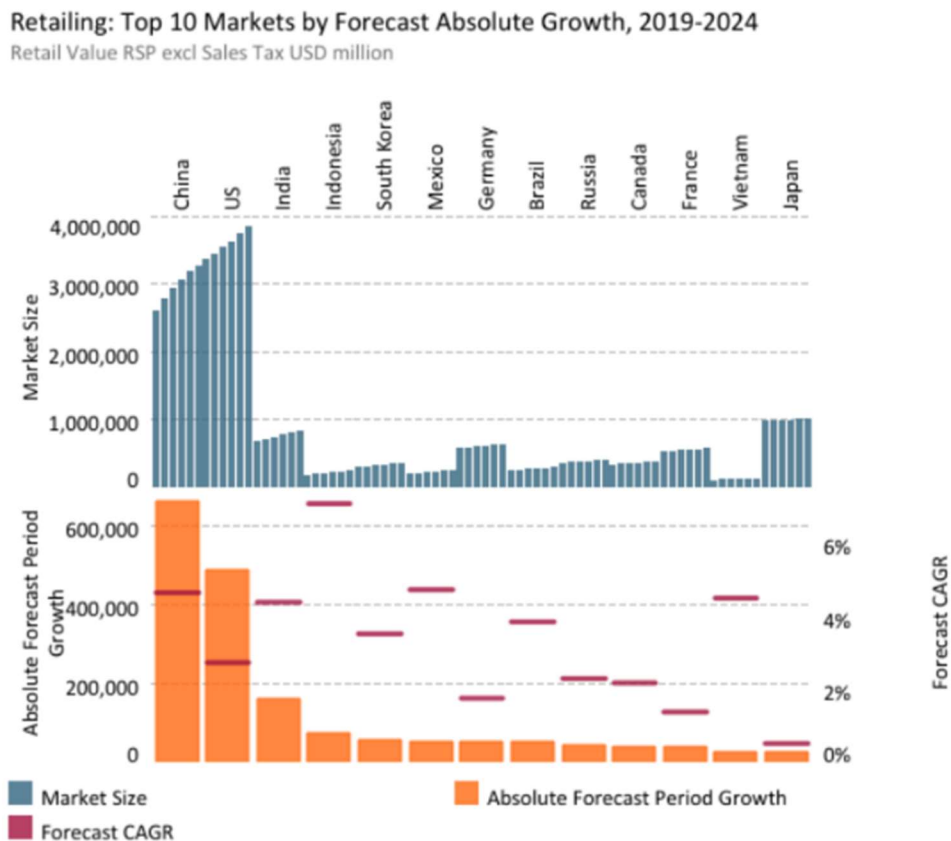
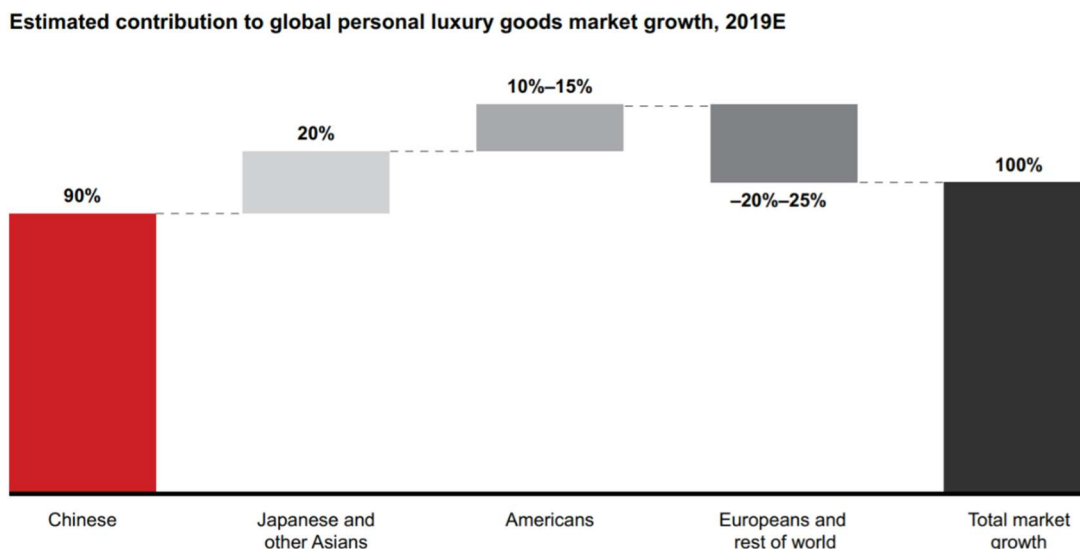


Figure 1. China will become the fastest-growing retail market



Note: Growth shown at constant exchange rates

Figure 2. Chinese customers account for 90% of the growth of the global personal luxury market

All Chinese luxury consumers are influenced by both online and offline touchpoints.

Information and channel preference of Chinese luxury consumers
Sources consulted and channel of last purchase experience



Figure 3. Chinese consumers prefer purchase premium fashion products offline

The survey shows that although consumers are interested in digital discovery, the in-person experience of brand stores is the most influential when making purchase decisions for nine of the ten young Chinese consumers, see Figure 4.

Among all engagement channels, the most impactful are in-person and in-store.

What are the most impactful sources of information that influence your purchase (top 3 mentions)?
% of survey respondents

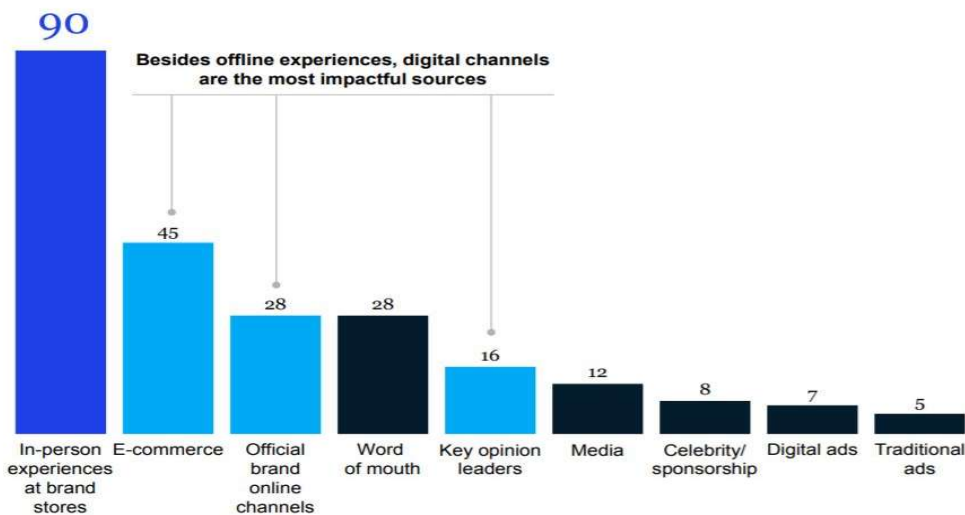
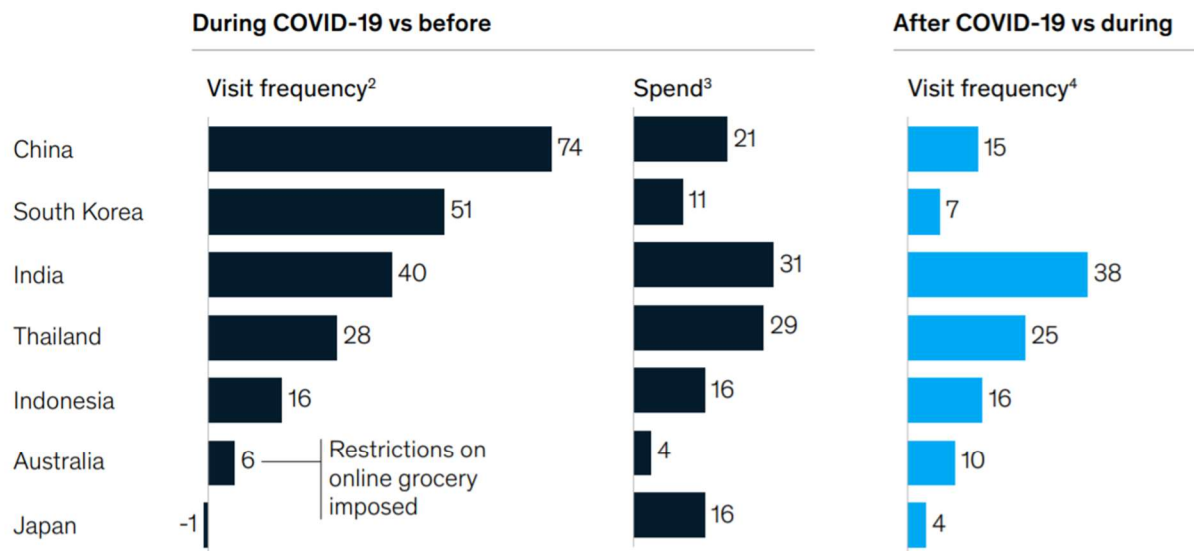


Figure 4. In-person experience of brand stores is the most influential for young Chinese consumers

However, the re-opening of physical stores does not imply that the business has gotten back to business as usual. Although all of apparel stores and department stores have reopened in China, the traffic flow and purchase volume are still 46% lower than the pre-Covid level. More specifically, during the peak period, offline apparel consumption dropped by 90%, and the economic activities of physical stores only recovered to about 41% of the pre-crisis level, and the first-tier cities with crowded environment in China recover more slowly than the second-tier cities.

An acceleration in online grocery shopping

Online grocery channel net reported behavior during COVID-19 vs before; net intent for after COVID-19 vs during (now)¹



¹Net behavior is calculated by subtracting the % of shoppers in the channel stating they have decreased visit frequency or spending in the channel from the % stating they increased frequency or spending
²Q: Among the below grocery shopping channels, which ones do you visit more/less frequently during the COVID-19 outbreak compared to before?
³Q: Which store types have you increased/ decreased your spending per month during the COVID-19 outbreak compared to before
⁴Q: Within the below store types, which ones do you think you will visit more / less frequently after the COVID-19 outbreak stabilizes?
 Source: COVID-19 mobile survey, 3/21-3/25/2020 N = 5,013, sampled and balanced to match general population (except India, with higher focus on consuming class)

Figure 5. Covid-19 promotes the accelerated growth of online channels due to blockade

Covid-19 has promoted the accelerated growth of online channels due to blockade, store closure and consumers' refusal to communicate face to face with sales and service personnel, and even after the crisis, China's online activities have slowed down, but the number of visits is still 15% higher than the pre-COVID-19 level, see Figure 5.

Besides, Chinese consumers in this period are more inclined to give new stores and brands a chance, after the pinnacle about 47% of them about 47% of them do not plan to re-visitation of essential stores and about 20% do not plan to return to their past brands. In the near future, offline stores will still continue to dominate the sales of premium brands, see Figure 5, and in-person experiential shopping is the reason for young Chinese consumers to return to offline stores. Two-thirds of millennial consumers have indicated that shopping experience will affect their purchase decisions.

Therefore, after the crisis, how to regain the trust of Chinese millennials and revitalize the physical retail space is particularly crucial for fashion brands. Due to the strong trend towards online shopping and the unsolved COVID-19, this study aims at researching on how to restore the change of Chinese consumers' shopping behaviours caused by COVID-19 and how to restore brand physical stores under the current unfavourable conditions. However, the study in this area is still insufficient, so this research is promising and profitable.

In summary, this paper aims to provide guidelines on how premium womenswear brands can drive more millennials female Chinese customers into their retail space in China, especially after the shift in consumer behavior towards minimizing social contact established during the pandemic, compounded by the lingering economic downturn and the typically higher price points associated with physical stores compared to online channels. The research objectives. To determine the main motivation behind the choice of physical stores by consumers; To

identify the measures that current brands' physical stores take to attract consumers into physical stores; To examine whether store experience can prompt target customers to choose physical stores to purchase. Finally, this study hopes to provide recommendations to premium womenswear brands the best approaches that can drive more millennial female Chinese customers into their retail space in China, especially after post-pandemic economic downturn and the rise of online shopping.

Offline is still expected to be the preferred luxury sales channel in the near future.

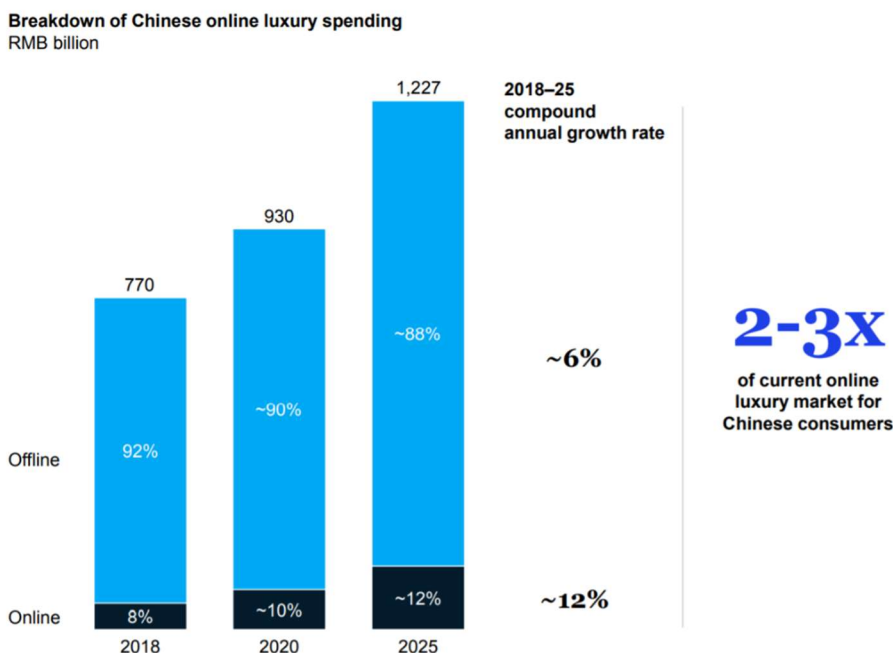


Figure 6. Offline stores will continue to dominate the sales of premium brands

2. Literature Review

Before COVID-19 broke out, most consumers used to shop in physical stores, according to the dramatic growth of e-commerce, the importance of physical stores gradually decreased, meaning that retailers must take measures to deal with the trend that consumers may turn to online shopping permanently [1]. What is worse, in the post-virus era, consumers' interest in physical stores has dropped to the lowest point for their own safety and health. Nonetheless, for most brands, physical retailing is as yet the focal point of their future deals, which can not be relinquished or supplanted, on the grounds that physical retailing is the fundamental channel of interaction among brand and purchaser, and physical retailing is additionally a significant method to grow retail development. What is more, there is proof that regardless of whether clients lean toward online shopping, they will even now go to the genuine physical retail space, so as to get face to face experience that web based shopping cannot give. However, the far-reaching influence of COVID-19 on consumers is a major crisis for the physical stores in the whole fashion industry. How to deal with this crisis management is the key to the revival of the physical stores after the COVID-19. In previous studies, many scholars expressed their interest in analysing and coping with crisis strategies, However, the fashion industry is still an insufficient research field in crisis management, and the Covid-19 is also an unprecedented disaster. So, there is no previous experience for retailers to learn from. Therefore, at the critical moment of the rise of online shopping and the impact of Covid-19, it is necessary to study how to cope with this crisis and attract consumers to return to the physical retail space.

2.1. Brand Crisis and Crisis Management

Brands are the key value of a market-oriented fashion organization, and the estimation of brand equity is the general value of brand, contingent upon buyers' trust in the capacity of brands to accomplish anticipated revenue and their eagerness to consider physical retail brands compared with competitive brands or online brands. But the brands will inevitably encounter crisis issues. Many past studies have pointed out that brand crisis generally refers to unanticipated events, which will threaten the ability of the brand to achieve expected benefits, thus weakening brand equity. Specifically, the brand crisis will bring many serious consequences to fashion companies, such as reducing profits; reducing the market share, or even lose the market, and seriously damage the brand image and reputation. As indicated by the investigation of Coombs, as per the attribution of crisis responsibility, brand crisis can be classified into at least three categories: victim crisis, intentional crisis and accidental crisis. At present, the crisis caused by COVID-19 is an accidental crisis, which is uncontrollable, so, brands have little responsibility for the COVID-19 crisis [2].

According to the theory of Yuan et al. COVID-19 pneumonia crisis is an external crisis, which generally refers to the change of domestic and international political and economic environment caused by various natural disasters and other unexpected risk events, resulting in the loss of brand property or serious business difficulties. However, this accidental crisis from outside, which is not directly related to the products and management of a certain brand, has caused an accidental negative impact on the brand, which was defined as brand burn by Balakrishnan.

Many scholars have expressed their academic interest in the impact of brand crisis on consumers, which also strongly proves its huge negative impact. Fashion industry is a cultural field, and consumers have a great influence on it. The facts also show that the negative reaction of consumers is the biggest threat to the brand in the crisis period. For example, the crisis will damage consumers' physical, emotional and financial situation, which may lead them to decide not to shop products in physical stores of brands. Moreover, although it is significant to research the consequences of the brand crisis, it is also significant to emphasize that after the brand burns, how to deal with the crisis is the key to determine whether consumers can be interested in the brand again. Therefore, the retailers' reaction mode after a brand has burned determines the degree to which the brand can be retained finally. This paper mainly studies how to deal with the crisis caused by COVID-19, so as to protect the retail space of the brand entity.

Although many scholars have proposed various methods to deal with the crisis, however, these scholars have not reached a consensus on the details of crisis response strategies. Especially in the period of external unexpected crisis, there are fewer articles on brand management. Keller and Lehmann even proposed that we should not recommend research on brand management during the crisis. However, due to the frequent occurrence of external unexpected crises in recent years, people should pay more attention to brand management suffering from sudden macro-environmental crises, as well as the damage restrictions and the strategies that can be implemented in the recovery stage after the brand has burned.

According to the research of Balakrishnan, the accidental crisis management model can be set into three stages in chronological order: the first stage: the precursor stage; The second stage: "crisis"; The third stage: the audit stage, and the recovery of the final stage. This is an overall response schedule formed by the combination of crisis management and brand management theories

In the first and second stages of the crisis, the reduction strategy, that is, to reduce the impact of the epidemic and minimize the damage caused by the epidemic to the brand, is based on the typology of Benoit, and the most suitable one among rejection, reduction of aggressiveness and

corrective measures, but this strategy can only reduce the brand loss, but cannot restore the brand equity. In these two stages, the brand's explanation level of the crisis may be an important factor for a successful response, such as providing consumers with information on all epidemic prevention measures implemented in brand stores during the COVID-19, to eliminate consumers' concerns about safety issues. Because it turns out that the response to explain the crisis-related problems is more favourable than the response without explanation. In the third stage, due to the change of consumer behaviours caused by the epidemic, people choose to reduce or refuse to go to physical stores as much as possible, which leads to the brand physical stores unable to run according to the original track and their old mechanism is in trouble. In addition, the external competition such as online shops and live streams is becoming increasingly fierce, and the change in external forces has broken the ideal thinking mode of empiricists. This means that it is impossible to rely on past experience to attract customers back to physical stores. Therefore, retailers at this time should spend more energy on the design of retail strategy and innovation.

2.2. Retail Design and Retail Strategy

Retail design is an emerging discipline that combines interior design, retail, marketing and brand promotion, but few retail designers regard it as a discipline related to retail strategy, although the theoretical framework put forward by Bitner in 1992 already indicated the need to link retail design with retail strategy. Madsen and Petermans also confirmed this theory, but he did not connect it with consumers. On the other hand, fashion shoppers has been widely studied in the past decades, but scholars seldom study the design of the shop environment where consumers buy products, and even designers have not reached a strong consensus on the concept of shop design. However, although the academic articles about how much consumers' choice of brand can be influenced by attractive store design are still limited, but many studies have been on the importance of the design of stores and its relations ship with their success, and there is evidence that positive benefits can be obtained by designing a physical store environment that excites and stimulates customers. Therefore, most retailers and brands have taken retail space design seriously as an important part of the marketing strategy.

Moreover, in retail design articles, fashion retail stores are also the most special existence, because the design requirements of fashion stores are stricter than those of general retail stores, and stores need to show exclusiveness and provocation, and attract the attention of target consumers in a unique way, to stand out from the competition of countless brands. In addition, since fashion trends are constantly changing, leading to diversification of fashion collections, fashion physical stores need more and more flexible designs to meet their needs of regular renewal.

Generally speaking, in order to distinguish their fashion stores from competitors, retailers and retail designers need to guide the retail design of retail space to trigger attractive customer experience.

2.3. Customer Experience

From the marketing point of view, experience is the interaction between brands and consumers, which is always influenced by the store environment or the place where the interaction takes place. Specifically, consumer experience is the total internal and subjective reaction when consumers come into both direct and indirect contact with brand companies, products and services, in which direct contact is the journey of consumers to purchase, use merchandise and accept service activities provided by brands, including all sensory feelings, emotions and behaviors of consumers to brands during this period, but this is only based on consumers' perspective. From the perspective of brand, experience is defined as conveying the all-round influence of brand marketing mix on customers. In depth, it refers to the connection between

consumers' five senses and brand, the display of brand logo and the design display of shop environment that can attract people into physical stores [3].

As far as fashion business is concerned, Kim put forward the concept of total consumer experience, which refers to the retail strategic business which combines the creation of excellent customer experience and the transaction with consumers, as the source of brand competitive advantage. Because there is evidence that high-quality experience can bring profits to retailers, it also proves the existence of experience economy, which urges brands to change from selling merchandise to services and from offering services to experience.

On the other hand, according to the findings of Sachdeva and Goel, the reason why customers go to stores is influenced by utilitarianism and hedonism. Utilitarianism is mainly due to demand, while hedonism is mainly due to experience. Donovan and Rossiter pointed out that hedonic retail experience will attract more returning customers and lead them to spend more time on shopping, because experience can attract consumers in cognitive, emotional, social, sensory and physical aspects, and previous studies also show that consumers with hedonistic intentions pay more attention to the physical environment of stores than consumers who have utilitarian intentions, so store experience design is very significant, furthermore, fashion shopping can be divided into hedonic shopping to a great extent.

In terms of providing a better consumer experience, Heinonen put forward a consumer-centered view, that is, paying attention to customers rather than services, which extended the shopping journey from supplier-centered to consumer-centered. Customer shopping journey includes all direct and indirect contact points between customers and brands in the process of brand experience [4]. Although some scholars admit that not all contact points can be controlled by brands, in the sense of taking consumption as the center, the current customers' shopping journey is still centred on brand companies. However, McColl-Kennedy pointed out that the current brand-centred experience can no longer fully cater to consumers' preferences, and the recent research also emphasized the importance of studying consumer-centred shopping experiences and activities, which requires brands to focus on target consumer research before designing store experiences.

However, although the customer experience is influenced by aspects that retailers or retail designers can control, such as the choice of retail space design concepts and retail strategies, there are also external factors that they cannot control, such as the subjectivity of customer experience, the particularity, dynamics and variability of time, weather and environment. Thus, the brand cannot completely control the process of client experience, they can just structure and deal with their retail store environment.

2.4. Store Environment

The overall feeling created by stores for buyers, which includes service assistants, store layout and store atmosphere, is called store environment. Store environment is an important part of marketing. The research of Holmqvist and Lunardo confirmed that an appealing store environment can enhance the customer experience and increase the enjoyment of consumers in retail stores, which likewise stressed the significance of the store environment in building up the brand experience.

Burlison suggested that retail brands should integrate the store image into the store environment to attract clients. Store picture alludes to the manner in which clients take a gander at brands [5]. There are 7 factors that affect the store image: products, services, convenience, consumers, equipment, promotion and store atmosphere. However, the selection of salespeople, training of sales communication skills, or using high-tech technology to help customers purchase will affect the quality of customer service.

However, Parsons argue that the store atmosphere is more important to the development of fashion stores, and an excellent store atmosphere is the key reason for consumers to patronize.

The atmosphere of a store is made out of numerous variables, the outside elements are where the store is found and its windows, and the inner elements incorporate lighting, music, scent, the general structure and plan of the store, and the nature of client care. Therefore, customer service can actually achieve excellent store atmosphere, and they complement each other. Philip Kotler put forward the concept of "atmospherics", which means "consciously designing environment to produce certain effects among customers". Previously, scholars focused on the effects of visual, auditory, olfactory and tactile factors on the shop environment [6]. However, the investigation on the general impact of store environmental factors is as if yet uncertain. Although individual atmospheric variables have their own roles in the development of customer experience, in the practice of retail space, the superposition of various stimulating factors finally produces results and affects customer experience, so the final effect of individual variables still depends on the customer's perception and evaluation of the whole environment. To sum up, the charming and complex result of the interaction between various factors and environment is the emotional reaction and behaviours of customers. Therefore, from the consumer's point of view, different retail environments will cause different emotional reactions of customers, and these emotions will in turn affect their behaviours. Therefore, Mehrabian and Russell summarized these emotional reactions and put forward the theory of PAD, that is, environmental stimulation and approach-avoidance behaviour can be related through three emotional States, namely pleasure, arousal and dominance. They argue that sensory variables and amount of information in both the environment and individual differences in emotional responses, will affect consumers' emotional reaction to the environment, thus causing consumers to choose to either approach or avoid the environment. Many scholars have paid attention to the relationship between pleasure and arousal and store environment. The research by Donovan and Rossiter shows that there is a positive link between pleasure and arousal. Therefore, retailers can attract target customers to enter their stores by triggering entry behaviour, but the store environment created for target consumers may also lead non-target consumers to take avoidance behaviour.

Therefore, Retailers can attract customers to the store by designing and creating a store environment and atmosphere that can trigger the positive emotional state of the customer, which means that designing a customer's in-store experience that can trigger customers' positive emotional state, and including high-quality customer service, store environment and store atmosphere, is an effective measure to attract target consumers into physical stores.

2.5. Retail Innovation and Digitalization

Early research shows that individuals go to physical stores mainly for leisure and entertainment, social interaction, seeking inspiration or killing time, which means that the entertainment of retail space is very important. In addition, some studies have pointed out, the key to the long-run success of retail stores is to make the customer experience in the store successfully provide value to consumers. These two research results also verify the effectiveness of hedonic customer experience, which can trigger customers' positive emotions and provide both value and entertainment for consumers. Therefore, Petermans advocated that as long as retailers and retail designers can create an in-store experience that conforms to the concept of "experience value areas" proposed by Pine and Gilmore, consumers can be attracted to immerse themselves in it or visit again. These four areas are entertainment, aesthetics, education and escape from reality. Digital technology is the most commonly used means of experience design in retail innovation, and it is also the easiest medium to realize the experience meeting the "experience value areas". As Kent discovered, utilizing innovation and digital technology to plan the store condition is valuable to improve the experience and spread the brand story. There is proof that retail digitalization has expanded the amusement of customers' experience and made their physical store trip more convenient and great. This also

an evidence that the importance of the innovation ability of physical stores in store environment design.

Furthermore, the research shows that the new and novel retail store design can be paid more attention to and liked, and can improve the customer's patronize rate and recognition by realizing the differentiation from the competitive brands, which means that integrating innovative technology into retail design is a direct and effective retail strategy.

For example, interactive technology has always been a hot topic in digital retail. Today's most popular mobile shopping makes consumers still use their smartphones frequently when they enter the retail space, which means the importance of integrating retail stores with interactive technologies, not only meeting the consumers' desire of digital interaction in the store, but also strengthened the in-store experience. In addition, interactive experience is also called "peak experience", because it can stimulate users to produce intense emotions and reactions, and is deeply impressed by this experience [7]. This is also an effective application of the PAD theory proposed above. Hence, many fashion brands have added computerized interactive technology to the retail spaces condition to build the digital experience of physical store clients [8]. However, there are as yet scarcely any researchers keen on the examination of clients utilizing digital interactive technology in design retail space.

The digital behaviours of consumers have changed the design and layout of physical stores, from trading places to entertainment places. The trend of localization of physical stores has also strengthened the convenience of retail stores, thus increases the frequency of people going to the stores. For example, New millennial consumers prefer to experience virtual reality by entering retail stores and interacting with brands, so as to obtain highly personalized and efficient shopping experience, while considering entertainment and social functions, which retailers can as well make use of, thus achieving the purpose of establishing emotional connection between customers and brands.

Therefore, it is worth noting that virtual reality technology is increasingly popular and valued. Virtual reality is a realistic 3D environment simulated by computer, which can enhance users' feeling in retail environment and enable consumers to interact with the environment. Park said that VR is a very efficient method to evaluate the design of fashion stores, because it is very easy to achieve the designer's expectation, but it also needs to consider its high investment cost. Many fashion retailers have added VR technology into their retail design, wishing to attract target customers. However, it was soon found that some consumers had an adverse reaction called Simulator sickness when experiencing VR, which means that designers and retailers must carefully evaluate when introducing innovative technologies such as virtual reality in retail practice.

In summary, The continued development of digital technology has changed retail space, It also enables customers to experience more personalized in-store experiences including personal services、 entertainment and social interactions. Yet Bell indicate that digital technology is almost useless to physical stores [9]. Although this statement is one-sided, research shows that digital experience does increase the interaction between customers and brands, but there is still a lack of clear research on how digital experience can promote customers' purchasing experience and consumption.

3. Methodology

The research objectives of this paper. To determine the main motivation behind the choice of physical stores by consumers; To identify the measures that current brands' physical stores take to attract consumers into physical stores; To examine whether store experience can prompt target customers to choose physical stores to purchase. this research aims to provide recommendations to premium womenswear brands the best approaches that can drive more

millennial female Chinese customers into their retail space in China, especially after COVID-19 and the rise of online shopping.

Therefore, the research questions in this paper. What is the main motivation for consumers to choose physical stores? What measures can brand physical stores take to attract target consumers into physical stores? Can the customer's store experience prompt the target customer to choose a physical store to purchase? post-epidemic, will the COVID-19 crisis have a negative impact on physical fashion stores?

In order to investigate and answer these research questions, this paper analyses and discusses the data and case studies in six related market intelligence reports through secondary research. Although these reports have different investigation directions, they all contribute to the research questions of this paper. The reports include quantitative and qualitative investigations, which can cross-supplement the data and information needed by this paper. Finally, these secondary data and case studies help the author draw the final research results. The main difficulty of this secondary research is the need to organize and give priority to a large amount of data from all secondary sources including websites of various market research companies. The main challenge is to classify and filtrate the secondary data in all relevant reports, and to cross-verify and confirm the information from multiple sources. Because the second research is to study the data collected by other institutions for other purposes, unlike the primary research, it is impossible to set up corresponding research questions at the beginning of the survey, and only use multiple ready-made data to cross to find answers to different research questions.

Firstly, the author investigated a large amount of market intelligence recently released by well-known companies on the Internet, collected all relevant reports and critically evaluated them, and determined the similarities and differences between the investigation directions of these reports and the research questions of this paper, cost-effectiveness and convenience are important advantages of secondary research, author who use method of secondary research, can select high-quality secondary reports. For example, the reports of large institutions have larger sample size and breadth than individual surveys, and the survey scope is broader, more representative of the target population, and has higher effectiveness and more universal findings. However, the disadvantage of the secondary research is that the collection purpose of secondary data is different, so it is impossible to answer specific new research questions completely and perfectly, because the secondary data may not come from what the researcher needs, like the specific target group or the required region.

In addition, this paper also uses case studies, because quantitative data have limitations in studying social and behavioural aspects, and case studies can study phenomena in a specific background, which helps the author to understand behavioural conditions from the perspective of actors. Specifically, the case study is not limited to quantitative and qualitative data, and the process and result of the phenomenon are explained through the complete observation and analysis of the target case. However, the rigor of case studies is often questioned. And multiple case studies generally study real events, so the author finally chose two related case studies, and through mutual verification of cases in similar backgrounds, the credibility and rigor of case analysis can be improved.

Moreover, this research is reliable and ethical. Because the market intelligence reports selected in this paper are not outdated survey reports, and these reports come from well-known and reliable market research companies. for instance, Mercaux has been listed in the "Top 50 Discoveries" list of Retail Weekly in 2020, which is a company focusing on digital transformation of physical retail and omni-channel customer experience. Forrester is an American technology and market research company with 13 research centres around the world. It is dedicated to analysing the most urgent business, marketing, and technical affairs in the world, and provides customers and people with suggestions on the existing and potential

impacts of technology. Euromonitor International is an independent global market research company with a long history in UK. Its business involves more than 80 countries and provides strategic research services for the consumer market. Furthermore, the reports used in this paper are all public reports published by these three companies on the Internet, and all related contents in this paper are marked with in-text reference, and their detailed sources have been put in the list of references, so there is no infringement of copyright and privacy, so the research in this paper is ethical.

Because this report is an annual survey of retail executives conducted by Mercaux Research in 2019, which studies the future of physical stores, they interviewed senior managers of many leading retailers, among which 61% of respondents have more than 15 years of experience in digital transformation projects in the field of apparel and fashion, and 33% come from retail. The research content includes the change of the role of retail physical stores; in-store technology; future salespeople; and consumer expectations. Therefore, the research content of this report covers the first three research questions of this paper, and its research subjects are mainly the personnel in the fields of apparel, fashion and retail, and the report was conducted last year and is not outdated. However, this report is a global survey, which is not only aimed at womenswear in China.

Adobe commissioned Forrester Research to conduct an online survey of customer experience technology and measurement decision makers in 1,269 companies in North America, Europe and Asia-Pacific region commissioned by Adobe to evaluate their methods of attracting customers and prospects in the customer life cycle and their investment in these areas. The research covers business priorities and challenges, current methods to support customer experience in the customer life cycle, and business metrics generated by work of marketing and customer experience. But this report covers eight industries, not only in fashion, so it needs to be cross-studied with Mercaux's report.

Moreover, this paper aims to provide guidance for premium womenswear brands to promote more millennial Chinese women consumers to enter the retail space in China, especially after the COVID-19 and the rise of online shopping. Therefore, this paper also uses the following four reports of Euromonitor International to supplement the missing related contents.

This report complements the impact of COVID-19 crisis on retail industry, involving two case studies, analysing the fashion retail industry after the MERS epidemic in Korea and SARS epidemic in China. In this paper, the third stage of Balakrishnan's crisis mentioned in literature review is evaluated through these two past epidemic case studies, and whether COVID-19 will seriously affect the effectiveness of the methods that can stimulate the vitality of stores, and the possible situations after COVID-19 epidemic are predicted.

This report of Euromonitor International examines the impact of COVID-19 on retail innovation and digitalization.

This report of Euromonitor International in February 2020 helps this paper to supplement the situation of premium womenswear brands in China.

This report of Euromonitor International in July 2020 helps this paper to supplement the latest situation and forecast of apparel retail industry.

Finally, this paper combines the findings and theories in the literature review to discuss whether the conclusions drawn from the secondary data can be cross-validated, so as to propose the best approach that womenswear brands retailers can use after the epidemic.

4. Findings and Discussion

According to Mercaux's annual survey of retailers, it can be found that 36% of consumers' motivation to choose physical stores is the opportunity to browse and discover products

physically; 33% is a special offer, such as sales and exclusive products; 5% is the word of mouth from other customers; 5% are shopping on e-commerce and wanted to see it in person, and 16% are The dedicated and personalized service from sales staff. In addition to the special discount factor, combined with Figure 7, "shopping", "experience and discovery" and "personalized service from salespeople" are the most significant motives for consumers to choose physical stores, while "the opportunity to browse and discover products" is the biggest driving force of store foot traffic, which shows that the ability to discover new products in person, through in-person experience such as physical touch, is the long-term advantage of bricks-and-mortar stores that online shopping cannot replicate In addition, 93% of the respondents believe that it is very important for salespeople to establish relationship with customers by face-to-face. Even though 40% of the respondents believe that their salespeople lack enough product information to provide customers with suggestions and create sales opportunities, "further training of salespeople in stylists and sales psychology" and "improving technology" are simultaneously recognized as the most important aspects to be improved in today's physical space, which shows the importance of customer service. Therefore, high-quality customer service is also a very critical factor in achieving a high-quality customer experience.

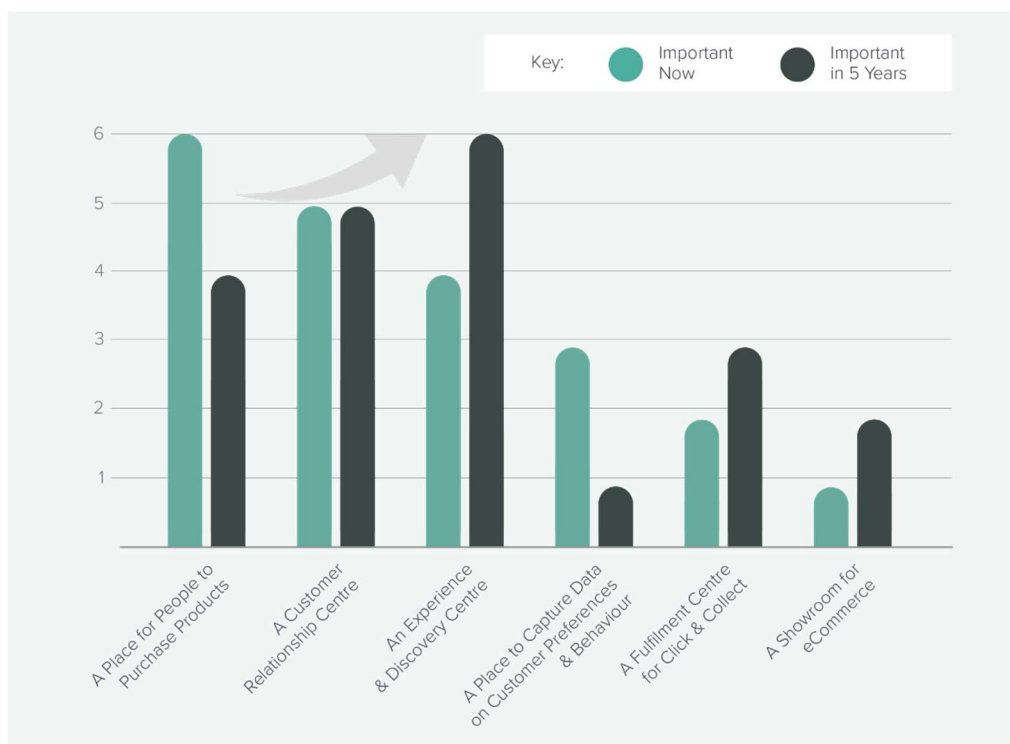


Figure 7. The importance of the different roles of the store now and in the next five years

However, when investigating the specific role of in-store digital experience in attracting consumers to physical stores, 58% of the respondents think that the increase of personalized experience provides the greatest value, and 60% of the respondents think that it is very important for the success of the store as a sales channel and order fulfillment center, because customers expect physical stores to have digital technologies such as digital styling, mobile checkout assistance, interactive screen, augmented reality and virtual reality. However, 53% of retailers have no plans for digital retailing, because adding digital experience to their retail strategies requires higher costs, and some retailers think that this is just a gimmick, which is not attractive to consumers. However, when investigating the main factors that promote and shape physical stores to their success, it is found that 65% of the main factors come from meeting customer expectations, 25% from digital strategy and 10% from retail strategy.

Therefore, when designing retail strategies, the key to attract target consumers to physical stores is to focus on customers and design experiences to meet customers' expectations.

Mercaux's survey also found that the lowest expectation of customers is to expect physical store sales assistants to check stock across the catalogue, view product information, recommendations and alternatives in-store, which means that click and collection and quality customer service are the basic functions of physical stores, see Figure 8. However, although only 23% of people expect interactive screens in physical stores and 15% expect augmented reality technology, In the future, 76% and 84% expect in-store experience including interactive screen and augmented reality, so it is necessary to consider high-tech technology when planning the long-term strategy of physical stores.

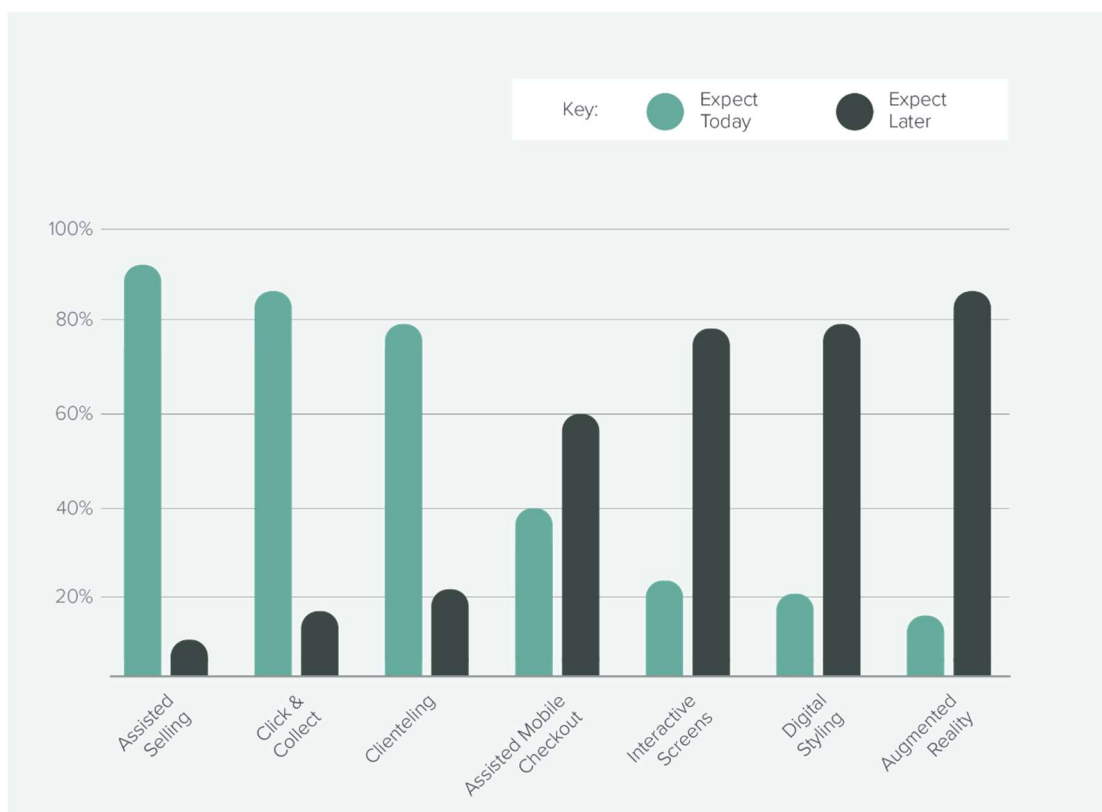


Figure 8. Customers expect today versus in the future

Forrester Consulting Firm studied the methods of attracting customers and prospects in the customer life cycle and the business impact of investing in customer experience. The results show that the experience-oriented brand is superior to its peers in business indicators in the whole customer journey. Specifically, the revenue growth rate of experience-driven brands is 1.4 times that of other companies, the growth rate of customer life cycle value is 1.6 times that of other companies, and the customer retention rate is 1.7 times higher than that of other companies. This means that customer experience has rapidly changed from competitive advantage to business demand, and consumers and commercial buyers begin to expect highly personalized experience, so retailers should give priority to and invest in digital retail, because research also shows that excellent experience promotes business growth. In addition, Forrester Consulting Firm also pointed out that the key business focus of retailers is to meet the increasing expectations of customers, so when designing measures to attract outstanding customers and potential customers to physical stores, priority should be given to realizing customer-centred in-store experience based on digital technology.

Therefore, the conclusions of the above two investigation and analysis reports are consistent with the results of the literature review in this paper. However, because these two studies were made before the outbreak of the epidemic, they did not consider the impact of COVID-19 on the physical retail space, and whether this impact will cause the above measures that have been verified to stimulate the vitality of the physical retail space to fail. Because China's short-term closure of all physical fashion stores due to the COVID-19 outbreak accelerated the trend towards online shopping and made e-commerce suddenly very competitive.

From the perspective of crisis management, according to the three crisis stages of Balakrishnan's mentioned in the literature review, it can be summed up that the first two stages can only adopt negative strategies to minimize the impact of the epidemic, such as maintaining transparency and maintaining customer relations through communication and announcement. The key to reviving retail stores suppressed by COVID-19 and accelerated online shopping is in the third stage, that is, the rehabilitation stage after the outbreak. This is the end of the crisis stage, and it also provides an opportunity for retail brands to experience lessons, heal wounds and move forward.

However, looking back at similar unexpected case studies of epidemic crisis in the past, the author found that the epidemic will not have much impact on the physical brand recovery in the third stage, which means that the impact of COVID-19 on physical retail space will not invalidate the measures proposed in the survey above that can stimulate the vitality of physical retail space.

In 2002, SARS appeared in China. Unlike COVID-19, SARS usually spreads only after people begin to show symptoms, which helps to control the outbreak. Even so, most of China was basically in a blockade state in the first half of 2003, and people avoided shops, restaurants and other public places to avoid being infected with the virus. Therefore, China's retail industry was also the hardest hit by SARS in 2003. However, when WHO announced that the outbreak of SARS had been contained worldwide in July 2003, the growth of China's retail industry had rebounded to the pre-crisis level, including the fashion industry, and the rebound to the pre-crisis level only occurred two months after China reported the lowest growth of its retail sales in the past two years, which means that China's retail industry may be able to grow and rebound rapidly in the post-COVID-19 period.

However, the birth of China's e-commerce market was also caused by the SARS epidemic that blocked China in the first half of 2003, which means that no e-commerce became a strong competitor of physical retailing during the SARS outbreak, while the e-commerce market was extremely mature during the COVID-19 period. So, the SARS epidemic case cannot be used as a reference for the situation of physical stores completely during the COVID-19 epidemic. Therefore, the author studied the situation of MERS outbreak in Korea in 2015 when e-commerce was fully mature. During the MERS outbreak in South Korea in 2015, Koreans avoided the crowd for fear of infection, just like during COVID-19. During the MERS outbreak in 2015, e-commerce proved to be successful, and physical fashion stores in South Korea experienced a sharp decline in 2015, because consumers cut their discretionary spending and spent the remaining budget on apparently safer online stores. However, it has been proved that post-epidemic, the foot traffic and sales of Korean fashion retail stores have all rebounded to the pre-crisis level in 2016.

Therefore, the above two case studies show that the subsequent impact of COVID-19 crisis on physical fashion stores can be ignored when considering the measures of reviving physical stores in the third stage of the epidemic crisis. However, if the research and development of vaccine against COVID-19 is unsuccessful, the crisis time of COVID-19 will be prolonged indefinitely. As a result, the longer the social segregation that causes brick-and-mortar shoppers to shift, the more likely it is to fundamentally change consumer behaviour.

On the other hand, according to a report on China's womenswear industry by Euromonitor International in February 2020, the value of Chinese womenswear increased by 4% in 2019, reaching 1,042.9 billion yuan, and is expected to reach 1,267.3 billion yuan in 2024. What is striking is that Chinese middle-class women have become new purchasing power. As Chinese millennial women are becoming more and more well-educated, mature and sophisticated, and pay more and more attention to individuality and innovation the new middle-class women in China are mainly millennials, which means that Chinese millennial female consumers have improved their fashion sense and increased their disposable income, and have gradually become the mainstream consumer groups of premium womenswear stores in China. China's premium womenswear brands have also become the preference of Chinese millennial female consumers due to their high quality and better customer service and experience. For example, in 2019 and 2018, fast-fashion retailers such as the Cheap chain stores owned by H&M Hennes&Mauritz AB and the Forever 21 have all closed their physical stores in China due to sales difficulties, while China's leading premium womenswear physical stores such as Koradior and Lancy achieved double-digit growth at the end of this research period. This means that premium womenswear stores are becoming the primary choice of Chinese millennial female consumers before the epidemic.

However, in July 2020, Euromonitor International released a new revised forecast of apparel from 2020 to 2024, which considered the influence of COVID-19. This report pointed out that COVID-19 will seriously curb consumers' demand for apparel throughout 2020, and Covid-19 exposed the inefficiency of retail stores. After the physical stores reopened, the foot traffic of fashion physical stores was lower than expected, which made retailers' hopes of "rapid recovery" in the second half of 2020 disappear. However, according to the quarterly update in the third quarter of 2020, the apparel retail industry is expected to rebound strongly in 2021, which is similar to the previous epidemic case studies reviewed above. Therefore, retailers of premium womenswear brands should prepare for the comprehensive recovery of the industry in advance, take more effective measures, design more attractive in-store experience for customers, and strive to attract more mainstream Chinese female millennial consumers to return to the physical retail space.

Furthermore, according to previous literature review and findings, we can conclude that designing a consumer-centered in-store hedonic retail experience is an effective measure to attract returned customers, and customers are more likely to pay for the experience instead of just purchase merchandise. However, due to the influence of COVID-19 and the increasingly fierce competition of e-commerce, ordinary store experience has been difficult to attract consumers who are increasingly fastidious and worried about their own safety. Therefore, fashion brands must make extra efforts, such as the innovation and digitalization of retail experience in line with the concept of "experience value areas" proposed by Pine and Gilmore, in order to help consumers rediscover physical stores. For example, VR and AR experience has been a hot topic before COVID-19, and it is also a means to provide experience value, which can meet the personalized pursuit of Chinese millennial consumers who intend to reduce fashion expenditure and may be wary of shopping in physical retail space before. However, COVID-19 has become the main destructive force of innovation. Before the outbreak of COVID-19, because of the prevalence of e-commerce, rebuilding physical space has become a strategic theme that has attracted much attention. Now the epidemic has accelerated this process, but the economic strength of fashion retailers has been hit hard by the epidemic, and the expensive innovative digital technologies should be re-evaluated. Even though the PAD theory mentioned above proves that environmental stimuli that can trigger pleasure and awaken emotions can attract consumers into physical retail space, retailers gradually regard stimuli as a means to distinguish in-store experience from competitors, and try to trigger consumers' emotions through exciting in-store experiences. However, after spending a lot of money, retailers may

face that consumers will soon become bored and dissatisfied with the same experience, and the positive impact of this digital experience will gradually decrease until it disappears completely. This means that repeated exposure to the same stimulus will reduce consumers' interest, but re-innovation will revitalize the retail stores and even increase target consumers' interest, which indicates that the experience settings of fashion stores must be updated frequently to keep customers fresh.

5. Conclusion

In conclusion, this paper studied the omni bearing influence of post-pandemic economic downturn crisis and the accelerated development of e-commerce on consumers and fashion industry, puts forward the concept of unexpected crisis management of fashion brands, and focuses on how to design and revive fashion physical stores and shape their future in the post-crisis period. In the face of unpredictable unexpected crisis, quick and effective decision-making is very important. When the brand struggles and fail to use traditional management tools to cope with the crisis, it is necessary to carry out retail innovation to survive.

The research results of this paper show that hedonism and in-person experience are the main motivations for customers to go to physical stores, which cannot be replaced by online shopping, and most retailers also have invested in customer experience and digital retail. Research shows that high-quality customer experience can attract and retain customers and bring profits. Therefore, optimizing the customer experience of physical stores is the best approach for premium womenswear brands to attract consumers to physical stores after the COVID-19, which is also the author's recommendation to premium womenswear brands.

Do research on target consumers and creating a customer-centered in-store journey by meeting customer expectations. Improve customer experience through high-quality customer service. By guiding the retail design of the retail environment and rebuilding the physical space, the attractive customer experience can be triggered. Innovating hedonic customer experience through digital technology, triggering consumer sentiment and increasing competitive advantage by increasing the entertainment and value of customer experience, and attracting more returned customers. However, the biggest challenge of the best approach to optimize customer experience is to maintain the experience advantage of physical stores for a long time by maintaining the freshness of customer experience. Moreover, in the fashion industry, consumers' great freedom of choice and competitors' strong customer experience strength have increased the sense of urgency of some fashion retail brands that have not been transformed into experience-driven brands.

There are limitation in this paper. The first limitation is that there is no investigation on the impact of each specific experience mode on consumers, such as interactive experience, VR experience and high-quality customer service experience. Therefore, the future research can study the differences in the impact of different physical store experiences on consumers, and which experience can increase consumer loyalty more. Therefore, after the end of the epidemic, it may be beneficial for future research to adopt a wider and more targeted focus, for instance, in the form of a targeted questionnaire survey of millennial female consumers across China.

This paper studies the post-pandemic economic downturn crisis from the perspective of brand physical store management. This paper contributes to the theory by increasing the research on brand retail space design, brand experience design and crisis management. This study provides a theoretical framework and practical guide for how to protect and develop physical stores through crises such as post-pandemic economic downturn and strong competition of e-commerce. This paper provides a structured basis for further research, and identifies the areas to be further studied. In addition, although this paper focuses on the customer experience and

unexpected crisis management strategies of fashion retail stores, the findings may be applicable to other types of physical store to some extent.

Acknowledgments

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