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CONSUMER PREFERENCES FOR ATHLEISURE AMIDST THE ONGOING PANDEMIC

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Abstract: Tremors of the COVID-19 pandemic have drastically disrupted the way we live our lives. Adjusting to the 'new normal' and living through the windows of Zoom, online classes, and work from home, this pandemic has not only changed the way consumers shop but also what they shop for. There is an evident shift in consumer demand for athleisure wear, which is the hybrid form between athletic and leisurewear, the roots of which can be traced back to the late 19th century. Athleisure made its official debut as an ongoing trend in the fashion industry post-2015. Be it office or in the comfort of one's home, today's athleisure can be worn in different settings. It didn't only incept the idea of normalizing practical and comfortable fashion for the masses but can also be considered as a movement in the fashion industry since it's enabled by improved textile materials that have allowed sportswear to be more versatile, comfortable, and fashionable. Athleisure which once started as a trend has now become a form of lifestyle. Through the course of this research, the paradigm shift in consumer behavior for athleisure wear during the pandemic will be studied.

Keywords: Athleisure, Consumer behavior, Pandemic trends, Online shopping, Influencing factors.

1. Introduction

As of 2020, the Indian athleisure market grew at the rate of 18-20% and was expected to touch 54,000 Crore, or roughly $8 billion, by the end of the year. Up until 2015, the usage of athleisure was limited to the comfort of one's home or solely during workout sessions. However, with changing times and especially amid the pandemic this pattern is no longer the same. There has been a shift and athleisure, or athletic casual wear is becoming a staple in mainstream fashion. In fact, athleisure's nature of comfort combined with elements of fashionable accents is influencing people to accept practical clothing. So much so that as of 2020, athleisure bottoms like jeggings and leggings have replaced the usage of denim jeans as wardrobe staples.

Unconventional apparel categories like gym gear that were once worn on specific occasions are now the new normal, playing an important role in people's wardrobes. The rise in the trend of health and wellness as a lifestyle is one of the key influential factors that has been driving the value sales growth for the athleisure market, over the years.

Growing sales is a direct reflection of the increase in demand for athleisure wear and this has further resulted in many players venturing into the Athleisure segment. With various new start-ups like Proyog, Kica, Tuna London there has been a visible growth of athleisure-oriented brands in the Indian market. So much so that various Indian celebrities have also been seen as the driving force behind the growth of the athleisure apparel industry by establishing brands like SKULT (by Shahid Kapoor), One 8 (by Virat Kohli), True Blue (by Sachin Tendulkar) and HRX (by Hrithik Roshan).

The presence of the brands mentioned above is in return also contributing to the growing competition in the athleisure segment. Hence, the industry is only expected to grow further influencing the market trends and offering increasing choices for consumers.

As of 2020, globally India only accounts for 2% of the athleisure market, which is worth about $300 billion. Since India currently covers only 2% of the global market, there is huge legroom to grow. The need for universally accepted versatile designs that are comfortable nine-to-dine outfits is what makes athleisure not only a trend but also a lifestyle that is slowly changing the way the world views practical, comfortable clothing.

The research will subsequently also examine the noticeable shift in consumer's choice of shopping platforms i.e. from buying in stores to shopping online. Furthermore, the research paper will explore the nuances in the retail sector through the medium of digital marketing and factors that influence consumer preferences, when it comes to athleisure. While observing global trends and cultures that have influenced the athleisure trends, the research primarily aims to be a detailed analysis of the athleisure segment at a regional level. The research will also focus on explaining how athleisure has become an emerging work from home among youngsters in the new normal.

2. Literature review

In the wake of the global pandemic, in April 2020, the Boston Consulting Group (Salfino, 2020) estimated that the fashion and luxury segment was bound to slip down a steep fall, owing to the series of global lockdowns. They estimated that the loss could swing anywhere between $450 and $600 billion in sales and could bring down the fashion industry to what it used to be in 2011. According to Javier Seara (Biondi, 28th March, 2020), BCG's global sector leader for fashion and luxury, this scenario would make it the biggest drop suffered by the fashion industry, counting the 2008 recession.

In the mid-months of the pandemic, when the cases were soaring, fashion-oriented countries like Italy, France, and Spain saw a sales decline that slipped 95 percent. The tentacles of this drastic drop and similar patterns in the fashion-retail sector started crawling across the globe and represented an existential danger for the fashion industry. The Indian fashion industry, which is pegged to be over $50 billion and is the second largest employment-providing sector in the nation came to a grinding halt from March 25 as the country slipped into a state of lockdown. The production lines were at a standstill, retailers were closed and the demand for retail started diminishing (Tamta, 2020).

So much so that the declining cash flow, obsolete footfall, and low sales figures forced fast fashion brands like Zara (Bakshi, 2020) to shut down up to 1,200 stores, mostly in the Asia and Europe markets. The Spanish fashion Behemoth reported its first loss since it went public in 2001. With respect to the Indian market, the well-renowned designer Ritu Kumar (writer, 2020)opened up about the current state of the fashion industry and commented, “The fashion industry has never been affected in such a definitive way around the world. We've had times when there has been a recession in different countries at different times but the whole world shutting down together is unprecedented”.

However, athleisure wear is the fashion industry's silver lining during these tough times. As of 2020, the Indian athleisure market is growing at the rate of 18-20% currently and is expected to touch 54,000 Crore (Anon., 2020), or roughly $8 billion, by the end of this year.'

On May 21, 2020, Lululemon Athletica Inc. the brand that has been recognized for popularizing athleisure wear climbed 92% from a low slump in March. This increase was possible due to their now flourishing e-commerce business. During the first week of April, a tracking firm (Berthene, 2020)came out with a report projecting that activewear sell-outs shot up by 40% in the United States, 97% in the United Kingdom. Interestingly, it was also noted that the sell-through rate for tracksuits (athleisure co-ords) during the month of March 2020 increased by 36% when compared to the same period last year.

While somewhere between social distancing, working from home, limiting outings and being engrossed in household chores, the demand for office wear, occasion wear, and business casuals has been declining, there has been a shift in demand for athleisure. Confirming this aspect, Ankur Bisen (Ladha, 2020), the vice-president of retail and consumer products, at management consulting firm Technopak, noted that while sales of outerwear and office shirts might drop, athleisure wear, or what he called comfort wear, would grow as work-from-home remained in vogue for a while. Even the sitting CEO of Myntra, Amar Nagaram too has said they will be "focusing on athleisure to stay relevant".

The shift in consumer preferences for athleisure wear is on a constant rise. So much so that industry experts are expecting the athleisure market to grow at a CAGR of 4.56% (k, 2020)during a span of three years, i.e. 2020-2023. Consumers seem to be resonating with experiencing the intersection of performance wear and comfort in their clothing.

This pandemic has been a catalyst in revolutionizing the narrative around practical clothing in the fashion industry. Athleisure wear which was seen as a casual style till 2019, has now risen up to be the leading global macro trend (Anon., 2020), shaping the future of the fashion industry. Athleisure is starting to become an everyday-wardrobe essential, especially during the 'new normal', athleisure wear has moved from the back of our closest to the front, signifying that there is a higher requirement of athleisure wear, also indicating that the frequency of wearing athleisure has increased (Huber, 2020).

Along with the comfort aspect of athleisure wear, it was also noted that there has been a drastic rise in people's concern to stay healthy and fit, hence athleisure wear became the face of this lifestyle change. So much so that, a 46% worldwide increase in download of health and fitness apps was seen during the lockdowns. In fact, India saw a higher increase in downloads of work out apps, rising by 156%. That translates to 58 million new active users (Ang, 2020). This is also a factor that has been pegged to be contributing to the rise of people wanting to buy more of the comfort versatile clothing.

Social media influencers have been a pioneer in contributing to the shift, often the millennials are immensely influenced by their lifestyle and want to wear the same clothes. Even celebrities are seen wearing athleisure clothing as part of their everyday clothing, influencing teenagers. Gen Z-ers (those born between 1997 and 2001) contribute to 40 % of all consumers and are estimated to spend $ 143 billion in America alone, contributing to the rise. (Rogan, 2020) With social distancing work from home, most places have shifted to being more result-oriented and image has become less important. Consumers are looking for more suitable items for comfort at home. According to the 2020 Lyst Index, athleisure, sandals, and face masks are among the most popular fashion trends for this year. The report showcased a 106% increase in demand for loungewear and activewear, as consumers sought comfortable clothes to wear at home, as well as attire for exercise and outdoor activities.

In fact, observing the changes in living patterns during the 'new normal' and hopping on to the athleisure trend wagon of 2020, marketing of this particular segment has drastically evolved and adapted. While various brands are curating assortments of #WorkFromHomeCollections, and #TheComfortSection on their digital platforms, other brands like Van Heusen and Peter England are focusing on repackaging their athleisure line during the series of unlock to meet the needs during the pandemic. (Kapur, 2020)

Nike's revenues for the first quarter rose by 5% reaching $10.1 billion, with online sales up by 36% compared to 2019 (Khusainova, june,2021). Nike ranked 1st in The Lyst Index 2020 Q2. This index analysis shows the online shopping behavior of more than nine million shoppers a month and also takes into account search data, conversion rates, sales, and social media mentions. Nike reported an increase of 75% in digital sales, which represents 30% of total revenue. The success of Nike in The List Index reflects the way in which buying patterns have changed in response to the pandemic and how the shift towards e-commerce has accelerated. Nike had previously set a target of reaching 30% digital sales by 2023 but having achieved that they have set a new target of 50% digital sales. (writer, 2020)

In this year's edition of the Retail Technology Conclave, India's top retail executives have unanimously agreed on the need to accelerate their digital improve their e-commerce as the pandemic has started changing the shopping behaviour. Sr. VP & Head - IT, Reliance Retail Ltd, Vikram Idnani prompted retailers to push the boundaries in the digital space and increase the contactless experience with customers. "All retailers are increasing the level of digital interaction with customers, making online a lot more-easy for customers." (Ladha, 2020)

In the same conclave, Krishnan Venkateswaran, Chief Digital and Information Officer for various Tata retailing brands spoke up about their company's experience of re-opening the stores during the unlock of the markets, "Many of our stores are open now, we are following safety protocols but obviously customers are cautious coming and spending the kind of time they used to spend in our stores. That is a fact and that will remain for some time."

It was also established by these well-renowned retailers that this pandemic has accelerated online shopping for millions of Indian households, even when brick and mortar stores saw a big slump in business. Further, there was a focus on how the retail experience is changing, B. S. Nagesh, chairman, Retailers Association of India; founder, TRRAIN (Trust for Retailers and Retail Association of India) and chairman and non-executive director, Shoppers Stop mentions, "If you have to survive in retail you have to adopt technology, you have to ensure that your people are trained, if your customers are digital you cannot live without digital."

3. Research design

A self-administered, virtual survey with a sample of 218 people was conducted. The target audience for the purpose of this study remained people residing in the metropolitan regions of the country who occasionally or regularly wear athleisure wear. While the questionnaire was anticipated to gain more traction, there was a time constraint along with the limitation of lack of physical platforms to circulate the questionnaire.

However, out of 218 respondents it was recorded that a majority of people who wore leisurewear were Gen Z, falling under the age bracket of 13-23 years, followed by 26% respondents belonging to the age group 24-34 i.e. early and late millennial and 10%i.e. 23 people belonging to the age group 46-56, that makes up the Gen X. Furthermore, it was revealed that 147 of the respondents were female, 68 were male and 3 respondents identified as the third gender.

4. Research insights

4.1. Understanding the paradigm shift in consumer behaviour during the pandemic with reference to athleisure.

In order to study the paradigm shift in leisurewear during the pandemic, while most questions asked were comparative in nature, some were scalar. Through the means of hypothesis testing, a question investigating whether the occasions for which athleisure was worn was changed during the pandemic revealed that while for some occasions the usage of athesiure was higher, for others it was decreased. For example, only 67 of our respondents agreed to wear athleisure wear for 'WFH/Online Classes' before the pandemic, whereas, the number almost doubled to 129 respondents opting to wear athleisure wear during the pandemic. However, there was only a slight increase in the number of respondents who opted for wearing athleisure wear for 'household chores', while 121 respondents confessed to wearing athleisure for the above mentioned activity before the pandemic, 126 people agreed to wear it during the pandemic.. The hypothesis testing results are:

Null hypothesis: During the pandemic, people wore athleisure for more occasion's Alternate hypothesis: There is no significant difference in the number of occasions for which athleisure was worn during the pandemic. The result shows that p value 0.42 is greater than the significance level 0.05. Hence, the null hypothesis can be accepted.

Furthermore, in order to understand consumer behaviour, a comparative question on the frequency of wearing athleisure was asked. The responses reflected the difference in consumption before and during the pandemic, while 64 respondents admitted that they wore athleisure every day before the pandemic 104 people confessed that they were wearing athleisure wear every day during the pandemic. This represents an increase of 62.5% which is quite significant. It was also observed that lesser number of people opted for wearing athleisure on the weekends before the pandemic, out of the 6% people claimed that they had never worn athleisure wear before the pandemic, only 1% of people continued to never have worn athleisure wear even during the pandemic. This indicates that the frequency of wearing athleisure may have increased during the pandemic. A paired T-test was conducted for this comparative data. The hypothesis tested is as follows:

Null hypothesis: Frequency of wearing athleisure has increased during the pandemic. Alternate hypothesis: There is no significant difference in the frequency of wearing athleisure before and during the pandemic. The result shows that the p value is 0.46. Since this is greater than the alpha value of 0.05 the null hypothesis can be accepted.

4.2. Assessing the increase in demand and the shift from online to offline shopping platforms during the pandemic.

A direct question to observe the demand for the usage of athleisure wear during the pandemic was suggested, wherein out of a sample size of 172 respondents who answered this question, the majority i.e. 57% of respondents said that their demand for athleisure has increased during the pandemic, whereas 30.8% respondents of the sample size believed that their demand for athleisure wear remained the same. Only 12.2% said that their demand for athleisure has decreased during the pandemic.

As an addition to dig deeper to understand the factors that acted as a catalyst to the increasing demand of athleisure wear, a question on these lines was asked. The data from the survey revealed that 56 respondents felt exercise/fitness to be the most likely reason for the increase in demand whereas 12 respondents disagreed with the factor and 30 respondents were neutral. In a similar contrast, 52 respondents feel Work from Home to be the most likely reason whil3 21 respondents disagreed for it being the reason and 25 being neutral. Nearly 46 respondents felt that the increase in demand for athleisure wear was linked to household chores and online classes to be the most likely reason for the increased demand whereas 11 respondents and 16 respondents disagree respectively. However, 41 respondents and 36 respondents are neutral to the factors respectively.

As a counter, a question on the frequency of working out patterns was asked, wherein, 85 respondents i.e 49.4% of respondents agreed that there was an increase in their work out patterns during the pandemic. 52 respondents i.e 30.2% claimed that there was no change and 32 respondents i.e 20% mentioned that there was no change.

4.2.1 Factors and shopping preferences

Out of the sample size of 172 respondents who answered this question, it was observed that a majority of 59% of the sample size shopped for athleisure during the pandemic. 30 people making up 17.4% revealed that the last time they shopped for athleisure was a month ago and the third highest filled option i.e. 26 respondents (15.1%) shopped for athleisure a week before they filled the form. Furthermore, 23 respondents making up 13.4% of the sample size shopped for athleisure two months ago and 21 respondents (12.2%) opted for two weeks ago. Furthermore, it was also recorded that 72 responses (41.9%) shopped for athleisure before the pandemic

To understand the shopping patterns, the consumers were asked to think about the last time they shopped for athleisure wear. Out of the sample size of 172 respondents who answered this question, it was observed that a majority of 59% of the sample size shopped for athleisure during the pandemic. 17.4% revealed that the last time they shopped for athleisure was a month ago and the third highest filled option was for 15.1% of respondents who shopped for athleisure a week before they filled the form.

Furthermore, to understand the preferred retail formats and modes of shopped, specified questions were asked. Out of 172 respondents, a majority of 65.1% agreed to use both online and offline shopping platforms for buying athleisure. While 20.3% preferred shopping online, and looking at the pandemic only 14.5% shopped offline from brick and mortar stores. The reason for the respondents preferring shopping online over shopping offline could be attributed to the ongoing pandemic and safety concerns. Within online shopping platforms, Myntra topped the list with 28% followed by Amazon which stood at 25.2%, and third individual brand websites at 22.9%. Flipkart and Ajio stand at 12.1% and 11.8% respectively. Furthermore, in the charts for the most preferred brand, Nike topped the list with over 92 respondents voting for it and there was evidently a close competition between Adidas and Puma, with 59 respondents choosing the former and 47 respondents picking the latter. Jockey was also in the race with 31 responses.

Moreover, it was also discovered that the buying patterns saw a change during the pandemic, with over 95 people agreeing to have shopped more online during the pandemic. On the contrary, 7 people agreed to shop less online during these times, the anticipated reason for the rise in online shopping patterns could be due to the pandemic as people feel safer when shopping online and they have been spending more time at home because of working from home. Looking at the offline shopping pattern 2 respondents agreed to shop more offline, and 13 have reduced shopping offline amidst the pandemic. In essence, the pandemic has also acted as a catalyst for the growth of the online shopping platforms when it comes to the athleisure wear category.

4.3. Identifying the factors that influence consumer preferences during the pandemic with reference to athleisure wear.

In order to get better insights into the factors that make athleisure wear unique in the eyes of the consumers during the pandemic, grading questions were asked. It was discovered that while 95 respondents felt “comfortability” to be the most likely reason with 1 respondent disagreeing and 2 respondents being neutral. 79 respondents voted for “fitting” to be the most likely factor with 1 respondent disagreeing and 18 neutral respondents. Nearly 59 respondents found the “versatility” feature to be the most likely reason with 9 disagreeing respondents and 30 respondents being neutral. With similar numbers, 44 respondents felt that the “availability of brands” and “trendy” to be the most likely features whereas 18 and 11 respondents disagreed on the factors respectively. However, 36 and 43 respondents are neutral to both the features. Furthermore, around 105 respondents that made up 61% of the sample size agreed to have styled athleisure by mixing and matching it with formals while working from home on a regular basis, while 16.9% of the respondents have revealed that they only do so when they are running late for virtual meetings or classes. This trend showcases how the tentacles of athleisure are penetrating the formal wear market, especially during these times, it also throws light on the comfort and functionality aspect of clothing.

Furthermore, while studying the spending patterns, it was also discovered that while comparing the category of athleisure wear i.e. top wear, bottom wear, and outerwear, the demand and spending for bottom wear i.e. joggers, sweatpants, leggings, shorts, etc. had drastically increased during the pandemic, which meant that people were spending more on it. A direct relationship was seen between the increase in demand and the increase in spending patterns during the pandemic for athleisure wear, top wear i.e. hoodies, sweatshirts, jackets, etc. were the second category where consumers spent the most, and top wear was at the end.

5. Conclusion

Responses from the questionnaire conducted positively indicate that there has been a change in consumer behaviour towards athleisure during the pandemic. A majority of 57% of respondents said that their demand for athleisure during the pandemic has been increasing, signifying an evident shift in consumer preferences for athleisure. Furthermore, it was observed that during the pandemic, there was a 62.5% increase in the number of respondents opting to wear athleisure every day. This could be linked to the fact that the pandemic has led to consumers wearing athleisure for occasions such as work from home and during online classes. 75% of the respondents revealed that they have been wearing athleisure during the pandemic while working from home or attending online classes. It was also observed that 59% of respondents have shopped for athleisure wear during the pandemic. These patterns in consumer behaviour showcase how the pandemic has only acted as a catalyst when it comes to the rise in demand for athleisure wear. The market that was anticipated to touch 54,000 Crore i.e. $8 billion by the end of 2020, has managed to perform well in the Indian subcontinent despite seeing dark days in the retail industry.

The influence of five features on the shopping behavior of consumers with reference to athleisure wear was conducted. These factors are comfortable, trendy, versatility, availability of brands, and fitting. Amongst these factors, respondents found comfort to be the most likely factor that was leading them to buy athleisure followed by fitting. 95 of the respondents opted for comfort as the most likely factor and 79 respondents opted for fitting. This was followed by 59 respondents who opted for versatility. Hence it can be said that the top three factors attracting consumers to buy athleisure wear are comfortable, fitting, and versatility. These responses are in synch with the reports of the Boston Consulting Group that suggest that the consumer wardrobe will only evolve into more casual clothing with a great deal of focus on athleisure wear, this insinuates that athleisure as a category priorities comfort and practicality, which are the undertones of the upcoming trends.

It was also recorded that there was a significant shift in respondents' workout regime during the pandemic, which could have also been a factor in the increase in demand for athleisure wear. 49.4% of respondents saw a drastic shift in their exercising patterns during times of novel coronavirus. In fact, 56 respondents believe that their demand for athleisure wear during the pandemic has increased due to their workout patterns as they strive to live healthier lives.

It was observed that working from home or attending online classes was a major factor for 98 respondents to increase the demand and frequency of wearing athleisure. 61% of total respondents have confessed to frequently mixing and matching formal wear with athleisure during the pandemic, whereas 16.9% of people have admitted to doing the same when they are running late.

When questions on shopping platforms for buying athleisure wear were posed, it was discovered that 65.1% of respondents agreed to use both online and offline shopping stores. However, it was analyzed that 95 people noticed a change in the medium they used to purchase athleisure wear, reflecting a shift towards e-commerce from retail. They shifted to online shopping from offline shopping. The most preferred online stores amongst the respondents were Myntra, Amazon and Brand websites.

For a category that has enough legroom for expansion in the future with an increase in demand from the consumer's end, there is not enough data available in the Indian context about preferences and patterns that factors in the pandemic trends. The research aims to help small and big homegrown businesses in whatever capacity possible, while documenting the factors that have influenced consumer preferences and a shift in shopping platforms during these unprecedented times.

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