COVID-19 and the dynamics of digital transformation:
Reshaping the fashion industry

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Declaration

I declare that this dissertation that I have submitted to Dublin Business School for the award of MSc in Digital Marketing is the result of my own investigations, except where otherwise stated, where it is clearly acknowledged by references. Furthermore, this work has not been submitted for any other degree.

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Abstract

The Covid-19 pandemic outbreak has had a major impact on the fashion industry. Fashion retail has suffered tremendously, and to survive, retailers have had to accelerate their digital transformation stages. This research study aims to explore and draw conclusions on the impact of Covid-19 on the fashion retail industry, as well as exploring how the fashion industry has adapted to cater to an online audience through digital transformation. Through the use of an exploratory thematic approach, the study contextualises leading concepts through a series of interviews of fashion designers in leading retail roles within the Irish market. Four established themes were identified, including: Fashion’s adaptation to digital transformation, Seamless integration of digital maturity, Innovative digital transformation trends among fashion retailers and fashion’s utilisation of social media. The results concluded that the fashion retailers are immersing themselves in digital transformation and innovation, and retailers are effectively starting to merge online channels with in-store shopping experience.
Introduction

The Covid-19 pandemic has had a significant effect on the fashion industry. These are unprecedented times, with harsh government restrictions, social distancing, and temporary removal of the traditional retail model. 'In Europe's clothing sector, compared to the same period in 2019, production fell by 37.4 per cent in the period between April - June 2020, when global coronavirus cases reached a peak. Retail sales of clothing products saw the most dramatic decline with 43.5 per cent of drop-in sales' (Shahbandeh, 2021). Fashion retailers have suffered tremendously and consequently, this sector has rapidly adapted to digital transformation and the implementation of new digital operations. The study explores the pandemic impact and the dynamics of digital transformation within the fashion retail sector.

The fashion industry in Ireland has adapted to cater to an online audience through digital transformation. A recent IBM survey reported ‘that the majority of global businesses (6 in 10) have accelerated their digital transformation plans due to the Covid-19 pandemic.’ (McClean, 2020). The pandemic has been a massive disruptor to every business sector. Customer behaviours have changed considerably, and online activity as well as purchasing have surged. This is primarily due to government restrictions and the closure of fashion retail stores. The problem statement is that the Coronavirus has disrupted the traditional operations of the fashion industry. The challenge that fashion retailers face is; how to keep existing customers and how to obtain new consumers. Sales have dramatically declined since the pandemic, and retailers are now heavily reliant on online channels. Covid-19 has forced a reshape of the high-street landscape and traditional sales model. This research study explores a deeper analysis of fashion retailers’ digital transformation within the Irish market.

Chapter One discusses literary perceptions of the pandemic’s effects on the fashion ecosystem, reviewing how fashion retailers use innovative methods of enhancing their digital maturity. This includes a discussion about how the fashion industry is evolving. This chapter includes the theoretical framework ‘Porter’s Five Forces Model’ and ‘Mellon’s Digital Transformation Maturity Model’, which was utilised for the research study (Porter, 1980; Chaffey, 2019). This theoretical structure will help examine a situation analysis on the retail model, as well as help determine and measure fashion retailer’s digital transformation current level.
Chapter Two discusses the research methodology designed using Saund’er’s (2019) Onion Theoretical Framework. This section explores research sampling, ethics, apparatus, procedure, and data analysis. This chapter includes the designing the key data collection, which is semi-structured interviews. The interview was designed using open ended questions relating to the concept. The significance of the study gained direct experiences of leading fashion retailers in Ireland, a group of self-selected designers who worked in this commercial fashion environment during the pandemic. Each participant vividly portrays their version of pandemic event as well as insight experts into fashion’s digital transformation. This qualitative research study explores and analyses data collection through a thematic interpretivism approach. This grounded theory is analysed inductively, through seeking meaning and patterns that materialise from data transcripts. The results revealed distinguish quotation and potential themes relating to fashion digital transformation that emerged from the interviews.

Chapter Three involves an in-depth discussion of the data results, as well as comparing and contrasting previous researched data. Four established themes emerged from the results. The themes discussed are the following: the pandemic effects: fashion's adaption to digital transformation, seamless integration across the retailing omnichannel, retailers utilisation of social media and innovative digital technologies trends. The key findings presented distinctive coded transcript on the established themes such as fashion retailers ‘rapid overnight shift’ to online channels during the pandemic, the emphasis of merging the instores shopping experience with customer’s omnichannel, creative tactics of how fashion brand communicate or optimise reach and emerging digital ‘virtual brandscapes’ trends (Stylus, 2021).

The significance of this research is answering the key question is how has the Covid-19 pandemic affected the fashion industry and how has it impacted retail digital transformation? As the effects of the pandemic are still evolving, the research is underexplored. This study is to gain greater knowledge of the impact of Covid-19 on the fashion industry and to analyse their adaption to digital technologies and processes. The value of this research is to identify digital trends and channels to help design effective marketing or digital transformation strategies. Through analysing changes within the fashion industry, as well as exploring fashion technology trends and innovation in this sector, this is a crucial area of research in helping us to understand the ‘new normal’ for fashion retailers in Ireland.
Chapter 1 Literature Review

1.1 Introduction

Outlined in this chapter is the impact of Covid-19 on the fashion ecosystem, customers, physical stores and why digital transformation now plays an essential role in fashion retail. This chapter will analyse academic literature that is relevant to the pandemic's impact and how it is reshaping the traditional landscape of the fashion retail model through digitization. A self-selection of contrasting literature will be used to bring creditability to the topic and provide interesting perspectives both during and pre-pandemic.

As the pandemic is a recent and ongoing event, the ‘new normal’ is underexplored. The pandemic has forced the fashion industry to reshape its business models, which has effectively caused an acceleration in digital transformation throughout the retail industry. It is crucial to conduct studies that will give a better understanding of how the fashion retailers are transforming, using digital technologies and developing their omnichannel. This study can help businesses design effective marketing strategies and identify a clear path through the digital transformation process and highlight innovative technology trends.

This chapter will look at literature sources on the pandemic effects and fashion’s digital transformation. Li's (2021) perspective underlines the pandemic is a “catalyst” and an unpredicted “accelerator” for fashion’s digital transformation. Casini and Roccetti's (2020) observation underlines the impact of Covid-19 and questions what will be the 'new normal' in fashion retail? i.e. is becoming a “mere warehouse” for fashion products? It is hard to determine what the future holds post-pandemic and what will be the 'new normal' for the fashion industry and physical retail stores.

Bertola's (2018) observation underlines that fashion retailers are now “truly customer-driven”. This chapter will investigate how fashions brands are innovatively marketing their products to the digital customers. The literature review aims to understand the impact of Covid-19 on the fashion industry and how it has adapted to cater to an online audience through digital transformation.
The “Porter's Five Forces Model” theoretical framework will be used to help analyse and evaluate the Irish fashion retailer's position of power (Grunty, 2006). The “Mellon’s Capability Maturity Model” will be used to give greater understanding of the dynamics of digital transformation and the advantages of adopting to e-business (Chaffey, 2019). Both theoretical frameworks will be used in a systematic approach to support academic literature observations.

1.2 Objectives

• To understand the impact of Covid-19 on the fashion retail industry and how it has adapted to cater to an online audience through digital transformation.
• To gain a perspective from literature on the positive and negative effects of COVID-19 within the fashion industry,
• To examine the fashion retail model and its current position of power and digital transformation using “Porter's Five Forces” and “Mellon’s Capability Maturity Model” theoretical framework
• To analyse a selection of literature relevant on Covid-19, the fast-fashion retail model and adaption to digital technology.
• To examine the development of omni-channels and impactful digital technology trends in fashion retail.

1.3 Fashion and Digital Transformation Terminology

The term 'digital transformation' has become increasingly relevant to changing business models and marketing strategies. Digital transformation is defined as “the process of using digital technologies to create new—or modify existing—business processes, culture, and customer experiences to meet changing business and market requirements” (Salesforce, 2021). Transforming to new digital systems and processes has provided broader access to products and customers, new customer experiences, and more efficient business operations.

For this study, the term ‘Fashion’ means the most popular or latest trends/style of clothing. It has strong attachments to culture in terms of “visual identity” (Oxford, 2021; Berward, 2003). According to Berward (2003) fashion encompasses everything from high end
Couture to the High Street, as well as advancing in fabric technologies from silk to polyester. This study will focus on the fast-fashion retailers and touch on haute couture for comparison.

1.4 Impact of COVID-19

The COVID-19 pandemic outbreak has disrupted many aspects of our lives in ways we could not imagine. The pandemic affected the entire world in many aspects including new ways of shopping, business operations, social distance practices. New behaviours’ in people have emerged too. Li's (2021) observation underlines “COVID-19’s hazard to health necessitated difficult country/city lockdowns, social distancing and stoppage of most human and business activities”. The outbreak of the contagious virus is affecting day-to-day life worldwide. A recent report of the World Health Organisation (2021) confirmed on “1 May 2021, over 153 million confirmed COVID-19 cases and 3.2 million related deaths have been reported”.

The fashion industry has suffered tremendously from the impact of the pandemic. (Casini and Rocetti, 2020; Shahbandeh, 2021; Li 2021). Lockdown and quarantine's dramatic shift into everyday life has undoubtedly had a massive impact on the fashion industry at all levels, from couture to ready-to-wear (Casini and Rocetti, 2020]. Many authors agree that the COVID-19 outbreaks rapid spread has been a massive disruptor and is causing an impact throughout the entire fashion ecosystem globally, in both luxury brands and fast-fashion. (Casini and Rocettini, 2020; Li, 2021; Kim and Zhao, 2020).

These unforeseen changes have affected the upper global fashion supply chain. Kim and Zhao (2020) highlight that due to the coronavirus, clothing manufacturers in China, Bangladesh, and India were hit hard by huge order cancellations or delays. These developing countries are of major importance to the fashion supply chain. China, one of the largest world clothing manufacturers and where COVID-19 was first detected, faced major delays on shipment and cancellations on clothing productions. China's government enforced a harsh lockdown, resulting in the closure of manufacturers/workforce, financial losses, strict border control, mandatory quarantine, mask-wearing and social distancing practices. This has had a global impact on distribution. The closures of these channels has caused a ripple effect of disruptions worldwide and throughout the fashion ecosystem.
1.5 Customer impact

COVID-19 has transformed how we are living, working and retailing. It has disrupted many customer’s/business activities and changed many social, economic, environmental, and technological factors. The 'new normal' has stimulated new movements and forms in customers’behaviours such as social distance restrictions, quarantine, closure of non-essential stores, mask-wearing, staying/working from home, restrict travel, etc. Customers are adapting through 'smart networking', remote working and learning tool technologies such as ZOOM and Microsoft Teams (Bertola, 2018). Customers have changed their online activities, consuming more video content, use of social platforms, and cybershopping. With the rise of COVID-19 cases, customers are staying at home restricting their movement; therefore, it has also created new patterns of behaviour when it comes to buying, priorities, and needs. Concerns grew with customers feeling unsafe or less comfortable shopping in stores. Siebel’s (2020, P96) observation underlines “the race to strengthen the digital customer environment is intensified by the fact that people are unable to safely visit stores physical spaces”. Customers have adapted to these concerns by shopping online. Online delivery has increased dramatically, primarily due to government restrictions closure of physical fashion retail stores and health concerns. Siebel's understands there is a competitive rivalry to gain the digital customer as development of these channels intensifies. Li agrees with Siebel that the customer purchasing journey is changing, adding to this he emphasizes that it is likely to have changed forever post-COVID-19. According to Li (2021) “reshaping both the customer paths to purchase and the actual points of purchase-patterns that are unlikely to revert to the pre-COVID-19 normal”. These pandemic behaviours consequently affect how we will operate permanently in the future.

1.6 Impact Fashion Retail

These unprecedented times have had a major effect on fashion retail, with government restrictions, operations disruption, temporary store closure or fewer customers shopping in physical stores and huge financial losses. Many fashion retailers are forced to close their high-street stores. The fast-fashion model is based on high sales revenue for low-cost apparel primarily relying on the physical retail store as its main sales channel. The temporary removal of the 'brick and mortar' model caused the fashion model to reshape and the fashion industry has suffered drastically (Casini and Roccetti 2020; Li 2021).
In a recent European study by Statista, fashion garment manufacturing fell by 37.4 percent from April to June 2020, compared to the same period previous year, when COVID-19 was at an all-time high. Fashion Retailers sales massively declined with 43.5 percent reduction in sales” (Shahbandeh, 2021). Adding to this, according to Casini and Roccetti (2021) signification losses for fast-fashion were happening for the first time in two decades while interestingly haute couture brands such as Louis Vuitton “with losses not greater than 10%”. For these haute couture customers, with fashion having a strong attachment with visual identity and “status symbol” these luxury brands are less affected by the pandemic (Berward, 2003).

1.7 Digital transformation reshaping fashion retail

“The world has witnessed the changes in consumer behaviour, the nature of retail, reshaping of the high street landscape due to the e-commerce revolution and continued expansion” (Nanda, Xu, and Zhang, 2021, p1). Nanda, Xu, and Zhang’s (2021) observation underlines the impact of the pandemic caused by the shift of consumer mind-sets, the retail model is altering, being reinforced with the development of technology and the advancements of e-commerce.

Many authors agree that the dynamics of the fashion retail model continues to reshape through digital transformation and customer purchasing has shifted to e-commerce (Nanda, Xu, and Zhang, 2021; Li 2021; Casini and Roccetti 2020; Siebel, 2021). The pandemic effects have caused drastic changes in retailer strategies and operating environments, causing them to immerse into the digital space. Retailers need to adapt rapidly to capture the digital customer through enhancing their digital environments.

Many fashion retailers are depended heavily on the traditional ‘brick and mortar’ business model. With temporary store closures, the problem statement that fashion retailers face is; how to keep existing customers and obtain new ones. Retailers are adapting from offline to online, in fact some “physical store” retailers have moved solely to an online presence relying entirely on the internet for sales. Casini and Roccetti’s (2020) observation underlines the retailer model has gradually altered from once being focused on the ‘brick and mortar’ physical store to existence and heavily dependent on online channels. Li (2021) supports this
pandemic shift stating in line with the continuous lockdowns and social distancing restrictions has resulted in an increase online operations to surpass offline channels.

The pandemic has been a stimulus for fashion retailers digitalisation, emerging the digital transformation stages. Li’s (2021) observation underlines the pandemic is a “catalyst” seen as an the unforeseen “accelerator” for digital transformation. Many authors agree for fashion retailers to 'survive', they need to speed up on digital transformation strategies (Li, 2021; Casini and Roccetti 2020; Santo and Sibel 2021). Global corporations seem to be implementing digital systems and are investing heavily in their digital channels. According to an IBM report, the majority of global organisations (6 out of 10) have expedited their digital transformation plans as a result of the pandemic. (McClean, 2020). It is essential for fashion retailers survival to enhance their digital maturity level (Chaffey, 2019). According to Santos and Siebel (2021, P94)businesses that “do not adapt may fail or be forced to close its door”. This seems to be a reality for many stores in Ireland and across Europe including H&M and Inditex (Parent company of Zara, Stradivarius etc.) (Jolly, 2021).

The argument raised by many authors is that the retailer’s digital transforming is reinforcing changes in customer digital behaviour. Customers who are not emerging on to the virtual space may find it difficult to get what they need especially during the lockdown. Siebel’s observation underlines “concerning adapting to consumer new needs, the time variable characterizes into the speed to technology. People all ages were forced to learn to deal with technology in order to be able to find virtually what they needed” (2021).

For retailers in the Irish market, this argument seems to be a reality and a tactic of survival. According to the Guardian, Zara will close up 1,200 stores globally, as the apparel brands attempts to drive traffic to the website and increase online sales during the disruptions shaped by the pandemic (Jolly, 2020). Closing the offline channels is a measure to save on retail store costs. It also seems to be a tactic to drive traffic to the online channels as it may be the only alternative for some customers.

The impact continues to reshape Ireland’s fashion retail landscape, the BBC recently reported “Gap has confirmed it plans to close all its 81 stores in the UK and Ireland and go online-only” (Simpson, 2021). As well as survival or financial saving decision to close its store, it also leaves its customer base no option but to go buy online. Gap transforming into a solely
e-business model and leaving Ireland's high street was unlikely to have happened in the absence of a pandemic. The Fashion retail model continues to reinvent itself and adapt to survive the epidemic.

Online platforms have continuously expanded and rapidly grown during the pandemic. Innovative Omnichannel developments are emerging, new features such as Amazon instant 'buy now' button or Alexa’s voice activation ordering. According to Nanda, Xu, and Zhang (2021) “the online platforms of retailing have expanded from a few websites (i.e. Amazon and Ebay) to a variety of alternative models, for example, the social media platforms, the independent retailer webpages, and mobile shopping apps”. With intense competition, customers spending more time online, retailers are trying to find ways capture the digital customers. Companies are now investing heavily in e-commerce and developing mobile friendly apps, social channels which seamlessly integrate with Internet of Things (IOTs) and improve the customers online experience. Companies are developing their websites to create seamless integration for the customer's online purchasing journey. Fashion brands are now integrating with customer’s IOTS and omnichannel, social media development to create a strong brand presence. This is essential to gaining a competitive advantage and obtaining new customers.

Li’s (2021) observation underlines that the pandemic as a ‘catalyst’ for retail digital transformation. Building on this Bertola (2018) would argue that fashion brands were already starting to digital transform in the pre-pandemic times, and that technology is a disruptive innovator re-altering the fashion ecosystem. “The fast-fashion model, a disruptive concept coming from mass-market producers, because of information and communication technology and real-time information exchange, has already re-engineered traditional cycles”. However, Bertola (2018) would consider the fast-fashion model to be a 'slow adapter' to innovative technologies. For example, Primark is still a non-ecommerce website, in further investigation this seems to be a market strategies to set themselves apart from competition.

1.8 Advantages of digital transformation

The fashion industry is entering a new era of the Fourth Industrial Revolution with advancements and emerging technologies such as the 5G network, smart textiles etc. Bertola’s (2018) observation recognises the positive potentials and more efficient, sustainable processes
of the fourth revolution. Digital technology is used as a retailer’s “competitive advantage” (Li, 2020). Technology can assist in efficient, more sustainable and fast business processes, improve customer services and new experiences. According to Siebel (2021) “physical spaces will be reframed so that, through immerse experiences, consumers can perceive the universe of a brand and product”. Through the technology, retailers are immersing themselves in integrating with customer's omnichannel both online and offline and creating innovative shopping experiences. Due to the pandemic, ‘digital solutions are communication expedients’ to bring products to the buyers, innovative digital experiences emerge from virtual catwalks, digital stores, interactive gaming, social shopping, and many more (Hobbs, 2021). There is a consensus among authors that the landscape of retail is reshaping (Siebel, 2021; Casini and Roccetti 2020). Sustainable trend on the rise retailers are changing the tradition landscape brands such as levis and cos are enhancing there platforms offering features of “ECO ecommence” where customers can buy sustainable preloved garments (Hobbs, 2021). Emerging technologies continue to be disruptive innovators the development is becoming more sensory enriched.

1.9 Disadvantages of digital Transformation

Digital technology has some disadvantages. Offline channels still hold a function, there is still a key benefit of physical stores, which are tactility, trying on a physical garment, the instant gratification of purchasing a product, or the in-person personal service. Workman’s observation underlines “clothing is classified as high-profile, touched, assessed, and evaluated. For retailers, this is challenging because of a lack of tactile online input” (cited by Saravanan, Alves, and Ribeiro 2020). Technologies are emerging rapidly and online services are improving, however it cannot provide or fulfil the same experience. There is also the inconvenience of the customer returning online purchases to consider. The in-person engagement of certain services, such as bespoke assistance, customer complaint, product repair and refill, is something that the internet cannot (completely) replaced (Nanda, Xu, Zhang, 2021).

1.10 Store digitalisation

The effects of the pandemic caused retailers to transform the in-store experience. To ensure the customer can shop safely at a social distance, with self-service checkouts, QR codes,
digital fitting rooms, 3-D body scanners, interactive mirrors, interactive app etc. According to Saravanan, Alves, and Ribeiro ‘To connect the gap between the channels, various technologies evolved to be a bridge for different channels, for instance, augmented reality and 3D virtual implementation to improve the traditional retail shopping performance, have changed the role of the fashion retail showroom’ (2020). Digital technology enhances the customer shopping experience. With the online experience becoming so innovative, the role of retail has shifted.

Many authors question what stores space is becoming due to the advancement of technology and online channels (Saravanan, Alves, and Ribeiro, 2020; Bertola, 2018 p362; Casini and Roccetti 2020). Casini and Roccetti's (2020) observations questions are stores becoming 'mere warehouses'? Or Nanda, Xu, and Zhang's (2021) viewpoint analyses, stores are becoming 'showrooms,' in which it allows a consumer to access the product during 'research shopping.' In the pre-pandemic time, some high-end digital transformed brands such as Gucci were already using fewer stores, they acted as 'teasers for online platform' (Bertola, 2018, P362). It is clear, retail is changing, however it will continue to be part early ‘research’ stages of the customer journey. This idea shows the major importance for investing in digital channels and for companies to advance further in the digital transformation maturity stages.

Abiding by government social distance restrictions forced the emergence of new features and services. Since the pandemic, retailers are utilising new methods of digital processes and engaging with customer through technology. Such as more video content, stylist facetime appointments, virtual queues, AI systems, VR clothes, VR catwalks, virtual purchasing, e-waitlists and other innovations.

H&M virtual Queue(H&M 2021) Penneys Appointments (Primark 2021)
1.11 Theoretical Framework - Porter’s Five Forces

In this study, the 'Porter's Five Forces' model helps us to understand the situation, analyse fast-fashion retail's current position, identify its key strengths, weaknesses and map competitive forces (Chaffey, 2019, P203). The Five Forces framework is broken down into the following components below:

1.11.1 The threat of new entry

- Low to Medium

The fashion industry is entering a new era of the Fourth Industrial Revolution with development of new/emerging technologies such as the 5G network, smart textiles, ecommerce and network advancements (Bertola, 2018). For small players, the new entry barriers are low. It has never been easier to enter the Irish fashion market with the assistance of e-commerce platforms such as Shopify, Amazon, and Etsy. Small pop-up businesses have emerged during the pandemic and competition had intensified.
The traditional fashion model is well defined, ‘red ocean strategy’, fashion companies are competing for the same target audience (Saravanan, Alves, and Ribeiro, 2020). Fashion retailers are now competing globally due to customers easy accessibility to the internet. As well as small businesses, tech companies such as Amazon, Facebook, and Instagram are effectively entering the fashion market creating new retail and 'social shopping' models with e-commerce expansion.

Although the threat of new entry is low, according to Brownless, 'To start fashion companies, important amounts of capital are required to put the whole value chain to work' (2020). However, for potential entrants, entering or expanding on a larger scale the fundamental barrier is medium. The barriers become more challenging, competitive, and large financial investment is needed to expand or outbid competition. Other challenges arise too such as finding the right suppliers that provides sufficient margins to make a profit. Fierce competition has caused fashion retailers to outsource manufacturing to save on costs of material and labour force.

1.11.2 Competitive Rivalry

- High

“The key ingredients of fast-fashion are the ability to track fashion trends quickly and to identify potentially popular new designs through daily proximity to fashion markets, fashion images and fashion makers” (Doeringer & Crean, 2004). To gain competitive advantage, brands such as Zara and H&M are now having numerous ‘collections’ drops every few weeks while traditionally it was on a per season basis. Fast-fashion retailers are competing to rapidly design or buy the newest trends first and with multiple trend collections and intense competitive rivalry it has led to price wars, multiple collection drops, limited time sales.

The rise of the fourth revolution has expanded the market reshaping the fashion business models and of course hit has become more competitive. Saravanan, Alves, and Ribeiro's observation underlines this: 'The evolution of internet technology has not only led to the competitiveness of independent and international fashion retailers but also the rise of new retail business models, such as aggregators, flash sales, subscription
websites ... This will increase the number of retailers competing for the same consumers’ (2020). The fast-fashion market has fierce competitive rivalry; Irish retailers are now competing with the global fashion market. Customers can easily shop online switching from brand to brand to find the best price. The fast-fashion traditional model is well defined, with ferocious competition fighting for the same target audience. Retailers are accelerating in their digital transformation maturity in order to gain a competitive advantage (Li, 2020).

1.11.3 Bargaining Power of Buyers

- High-Medium

   The bargaining power of buyers is high with multiple choice of fashion brands, customers can instantly and easily switch from brand to brand on the internet search best price of the item. Bertola’s (2018) observation underlines the fashion market is 'truly customer-driven'. It is becoming harder for buyers to have loyalty to fast-fashion brands. Since the pandemic, fashion brand retailers are emerging onto customer's Omni-channel, actively engaging with their audience on social media and in this way driving traffic to their website to generate sales.

1.11.4 Threat of Substitution

- High

   In the fashion industry, there are few alternatives for clothing. However, with the intensity of competition, the threat of substitution is high with such a variety of fashion products presented in the Irish market. According to Ribeiro, Alves, and Saravanan (2020) the “fashion traditional retailer is threatened by substitute goods due to a variety of fashion brand products available online shopping”. Buyers can find alternatives quickly switch to different websites in order to find the lowest price. With high ‘buyers power’ and competitive rivalry, it is difficult to maintain a strong market position. Brands are substituting the 'basic clothing' with innovative ideas, digital
experiences, or personalisation. For example, “Nike's ‘By You’ creating your own iconic sneakers” a customer-designed product (Nike, 2021). This also altering the traditional fast-fashion model and expanding the “blue ocean strategy” (Kim, 2005).

1.11.5 Bargaining Power of Suppliers

- Medium to low

Adebanjo and Mann's (2000) observation says “in the drive to satisfy consumers, who are increasingly demanding and sophisticated, the powerful retailers seek greater responsiveness and flexibility from manufacturers”. With severe competition fast-fashion brands are pursuing suppliers that have the ability to create the product quickly, immediately compliant with changes, while still providing a profitable margins.

The level of bargaining power for suppliers is low to medium. it is difficult in the Irish market to get clothing manufactured locally and still have a profit margin. For small ‘new entry’ players, it may be initially challenging to find external suppliers and large funds are needed to buy in bulk in order to take advantage of economies of scale.

Today, large fashion retailers are outsourcing suppliers globally to countries such as China where labour and material are significantly lower. Larger fashion brands have the power to choose multiple suppliers all over the world and negotiate for the lowest prices. Building on this, according to Perry and Tower 'The fashion industry was built on adversarial trading relationships that were short-term and characterised by multiple sourcing, price orientation and competitive bidding...Fashion apparel is characterised by low supply uncertainty but high demand uncertainty' (Lee Cited by 2012).

The low bargaining power for outsourced suppliers, comes with less control of production. Retailers are heavily reliant on trust regarding the quality and standards of suppliers and outsourcing to other countries has the disadvantage that retailers cannot regularly inspect factories. Bertola’s (2018) observation underlines that the competitive market is “truly customer-driven”. Customers are demanding more sustainable
products; therefore the barrier is increased due to the difficulty in finding a legitimate certified supplier.

1.12 Theoretical Framework - Mellon’s Capability Digital Maturity Model (Chaffey, 2019)

The impact of the pandemic has caused companies to accelerate through levels of ‘digital Maturity’ for optimisation of online sales (Chaffey, 2019). During the pandemic ‘Inditex has reported a 50% surge in online sales in the last quarter and 95% during the month of April and H&M has increased 36% of its online sales in the months of March to May’ (Forbes, 2021). Retailers are investing innovatively in digital assets to create more efficiency in processes, services and customer experience and advancing through their transformation growth stages more quickly, to capture sales and ‘digital customers’.

While there are multiple versions of the Digital Transformation Maturity models, for this study we will briefly look the Mellon’s Capability Maturity Model (Chaffey, 2019, P232). This framework underlines the adoption of the e-business model. It is a useful tool which helps identify a clear path through the transformation process. It is also a situation analysis that distinguishes where fashion retailers are in the transformation journey. Companies benefit from using a Digital Maturity Model to help them design effective digital transformation strategies.

The Digital Maturity Five Stages are as follows:

Level 1 Initial

Companies have no clear strategy or direction for an e-business (Chaffey, 2019). Behaviours are experimental, they are inconsistent or have limited experience in the potential of digitisation and don’t fulfil their technology capabilities.

Level 2 Repeatable
Businesses are operating on a basic level of e-commerce operations, in “isolated silos” and can repeat (Issa, Hatiboglu, Bildstein, and Bauernhansl 2018). They do not consistently plan or employ good marketing strategy e.g. SEO.

**Level 3 Defined**

Ghamdi (2014) describes this stage as an “interactive online presence”. The Business has a clear digital strategy, defined goals and starts actively connecting across the cross-sectional channels. Adding to this Issa, Hatiboglu, Bildstein, and Bauernhansl's (2018) observation underlines “digital transformation is being handled as a business problem that needs an overall vision and integrative approach”.

**Level 4 Managed**

This is the stage where the Businesses have integrated online-central business systems, managing multiple activities with ‘control and analysis’ using detailed measures i.e. Key Performance Indicators (Chaffey, 2019). They incorporate personalisation, social media, seamlessly interfacing mobile to websites, using integrated systems and advanced software such as ASOS's 360 view data sources.

**Level 5 Optimised**

Advanced e-business on this level is well-define where the digital strategy is mature and maintains a strategic benefit (Prananto, McKay & Marshall, 2003). The omni-channel is seamlessly immersed in core operations systems. Forbes expresses the optimised level as nearly “all of their activities are undertaken strategically, and most are fully streamlined, coordinated and automated” (Grossman, 2018).

**Extended Enterprise**

This ‘Optimised’ level is also known as 'Extended Enterprise' in some theoretical frameworks it’s an additional stage of maturity (Chaffey, 2019). This is where E-businesses are disruptive innovators in their digital transformation. With the rise of the fourth revolution
and emerging technologies, this is business which is operating in innovative ways. An example of an extended enterprise is Amazon's warehouse robots. Operating on the 'Kiva' system with barcodes seamlessly interfaced with the central data system and website. These AI self-driven robots and using advanced data analytics can recognise a popular item in a cart and have it hover near the front of the warehouse, ready to go. This optimises efficiency, accelerating the delivery operations processes.

There are many innovative digital features for optimisation and extending the digital based enterprise. Casini and Roccetti’s (2020) observation underlines artificial intelligence (AI) and its incredible potential for application to numerous aspects of the fashion industry using Big Data from online platforms. Global trend forecasters WGSN and Stylus report, fashion retailers immersing into the experimentation of 'tactile internet' creating sensory-rich virtual experiences (WGSN, 2020; Stylus 2021). It is arguable that the pandemic has impacted retail transformation trends and developments significantly in omni-channel, virtual reality, and social shopping.

1.13 Omnichannel

The effects of the pandemic has caused retailers to rapidly develop further in their digital transformation stages. Nanda, Xu, and Zhang’s (2021) observation underlines “Covid-19 … has accelerated the existing transition trends and forced more retailers to enhance their multichannel business”. The epidemic outbreak triggered retailers to rapidly develop and improve their multichannel and seek omni-channel expansions.

Bertola argues that fashion retailers were already advancing their omnichannel and connecting online and offline. Bertola’s (2018) observation underlines, some companies “can design and deliver complete solutions for omnichannel retailing, managing every phase of the shopping experience and integrating the digital and physical shops”. However, the pandemic was a “catalyst” that triggered an acceleration of digital transformation for majority of retailers (Li, 2021) not just ‘some’ of them.

Saravanan, Alves, and Ribeiro (2020) perspectives underlines, “the traditional retailing industry has been driven to seek innovation by the latest update technologies solutions due to consumers adopting the new technologies and becoming omnichannel consumers”. The ‘new
normal’ customers taking on new pandemic behaviours are consuming more online content, using new technologies, remote tools and changing purchasing behaviour, developing into a new type or more advanced digital consumer. The fashion retail market has fierce competition and has suffered considerable losses due to the pandemic. Companies were forced to rapidly become “retailer - tech savvy” and integrate themselves into customer’s omnichannel (Saravanan, Alves, and Ribeiro, 2020).

Unlike previous to the pandemic where retailers invested in ‘digital’ to increase business, now in many cases retailers have had to invest in their omnichannel purely in the hope to “survive” the pandemic and retain or obtain new customers. Many retailers have adapted and excelled in their digital maturity, more & more retailers have begun immersing themselves in customer’s omnichannel. According to Siebel (2021) “companies that invest to make their digital channel more attractive with relevant content, easy and intuitive navigation, and an assertive post-purchase experience will have the great potential to retain new customers”. Retailers are now advancing and immersing seamlessly in omnichannel improving users experiences, creating more engaging content and enhancing the digital experience, to improve customer satisfaction or experiences in their attempt to reach and retain customers.

Developing omnichannel and experiences

Li (2020) observation underlines it is important “to optimise your customer journey is data …. today consumers expect personalised user experience across many channels: email, mobile, social, advertising and the web. But you have to collect and track the right information to deliver that”. Therefore for the fashion retail market, it’s not only the pressure to have the latest trend in products and given the fierce competition, retailers now need to be up to date or at the top end of technology trends in order to have an advantage over their rivals. More than ever before retailers are developing websites, actively engaging with customers via social media, email, mobile, and other marketing channels. Retailers are recognising the benefits of data, investing in advanced AI system, personalisation automation in order to build a strong relationship with customers. It is no co-incidence that this has all happened during the Covid-19 pandemic.
Being forced to stay at home, customers are changing their behaviour too, spending more time online consuming video streams, social media and online shopping. “54% of consumers wanted to see more video content from a brand or business they support” (Hubspot, 2020). The acceleration of retail digital transformation strategies has led the online experience to become more ‘sensory-rich’. More innovative experiences have emerged, fashion retailers are creating video content, in its tactics to drive traffic and the users spend more time on their website and potentially gain sales.

1.14 Social Media

According to Kim (2020) “Consumers are likely to trust, be loyal to and advocate for anthropomorphic brands with human characteristics ... personify the brand on social media and interact with customers to create emotional connection”.

During the pandemic retailers increased their social media activity. Retailers are now actively using it to engage with their target audience to build trust, loyalty and an emotional connection with their fashion brand. It has become a channel to optimise sales. According to Facebook survey “84% of people want to discover new products on social media” (Instagram, 2018).

Social media channels are an influential tool that have the ability to achieve optimised sales, as well as the opportunity for retailers to expand their ‘virtual’ customer base, especially with innovative video content. According to Influencer Marketing Hub (2020), Louis Vuitton has over 7 million views on per video post on Instagram.

Li agrees with Kim (2020) that social media can create emotional attachments with viewers, his observation underlines “social media also affects the emotional factors of the public”. As part of new marketing strategies, influencers are constantly used to endorse fashion retail products. Bertola’s (2018, P362) observation underlines the “rise of screenwear... caused a noticeable transformation to the fashion system”. Social shopping and social media has become a gamer changer and is reshaping the fashion ecosystem. Social media has become a direct channel to obtain sales and provides an essential channel for communicating with customers. ‘Screenwear’ or Instagram aspirational imagery has evolved into features for online
shopping, such as ASOS’s ‘similar items search’ feature. With emotional personification, new
digital trends emerge such as YOOX avatar Instagram influencer with 2.6million subscribers
(Casini and Roccetti, 2020). Social media is now a powerful influential tool where fashion
retailers use these platforms as a way to ‘communicate’ fashion products to customers.

1.15 Virtual/Augment Reality (VR/AR)

Balenciaga’s ‘Afterworld’ AW 2021 Collection, John Lewis Virtual Store 2020 (Hobbs,
2021)

With avatars comes other innovative ideas. Haute Couture are investing heavily in these
emerging technologies and creating experiemental fashion experiences such as artificial
intelligence ,virtual reality and augment reality. Due to the effects of the pandemic and social
distance barriers, fashion retailers have developed and adapted with virtual catwalks, global
fashion events (eg. Pitti Imagine), VR Clothing (eg. Amazon VR) etc. Fashion retailers utilise
technology as 'communication expedients' presenting products to the customer (Bertola 2018,
Reimagining the fashion catwalk, Balenciaga released an interactive gamer runway, the
'Afterward world' (Hobbs, 2021). The cancellation of events due to the pandemic has resulted
in immersing in the virtual space extensively. Retailers innovatively find new interactive ways
of presenting products to consumers and creating enhanced experiences. According to Li
(2021) during the pandemic 'digital engagement has accelerated tremendously, leading
companies have innovated quickly to replace or complement traditional, in-store experiences'.
Even the fashion mainstream are creating these ‘brandscapes’ such as the H&M, Simona Rocha
AR collection. Bertola's (2018, P360) observation underlines virtual events/shopping “enable
a significant reduction of cost, time and workload with clear benefits in efficiency and
sustainability”. With social restrictions, John Lewis’ 3D virtual tour created 'digital twins' of
department stores space so customers could shop safely and enjoy an innovative experience (Hobbs, 2021). A key benefit in the laws of digital transformation is the “elimination of time and distance barriers” with fashion enthusiasts able to have new experiences from the comfort of their own home (Schmarzo, 2017).

1.16 Gap in Knowledge

According to Casini and Rocetti (2020) the “last few months have certainly strained the business of fashion in an unprecedented way and … things are not going to go back to the way they were completely”. The effects of the pandemic and the 'new normal' is still evolving. The impact of the pandemic on fashion retail in the Irish market is underexplored with little literature on the subject. This is why it is necessary to conduct a research study in this underexplore area.
Chapter Two: Methodology

Research Design and Analysis of the effects of COVID-19 on fashion retailer’s digital transformation

2.1 Introduction

Chapter one exhibited a critique of the literature pertaining to the ongoing effects that the pandemic has had on the fashion industry, the ‘survival’ and the ‘new normal’ of fashion retail by adapting to digital transformation.

“Normal has been redefined, and while the pandemic has shifted both our world and our thinking, there is cause for optimism. Careful planning, an open mind, and a flexible approach will all be crucial to future survival for all brands and businesses” (WGSN, 2021).

This chapter will discuss the research methodology and design using Saunder’s (2019) onion systematic theoretical framework. This section will also include the research sampling, ethics, apparatus, procedure, and data analysis. In line with chapter one, this chapter will present a selection of participants chosen for the study and analyse the data collection findings, mapping the stages of the exploratory process. The researcher will conclude the stages of the thematic analysis and how potential themes emerged, from participant's perspectives on the pandemic effects on the fashion industry and how fashion retailers in the Irish market rapidly shifted to online for the survival in the new normal.

2.2 Aim Of Research

As stated in chapter one, the fashion retail landscape is reshaping. The pandemic is still occurring at time of writing, its impact on fashion retailers is underexplored and has received very little attention.

This research aims to analyse the impact of COVID-19 on the fashion industry and how retailers have adapted to cater to an online audience through digital transformation. The research aims to explore the key questions; how has the COVID-19 Pandemic affected the fashion industry and how has it impacted fashion retail digital transformation? The research examines the effects in the Irish fashion market and seeks to understand how the pandemic has
reshaped the fashion retail business model? Is there a digital trend or channel that has been most impactful during the pandemic?

The significances of the research is to help understand the 'new normal' of the fashion retail model and how the dynamics of digital transformation are now being utilized. The study can assist companies digital marketing personnel to understand the new landscape in which fashion retailers find themselves and highlight digital trends that are emerging. The research is a valuable input to designing an effective digital marketing or business strategy.

2.3 Objectives of the Research

- To gain a deeper understanding of the impact of Covid-19 on the fashion industry and how the retailers adapted to cater to an online audience through digital transformation.
- To analyse a selection of fashion authorities' perspectives on the impact of Covid-19 on fashion retailers and the adaption to digital transformation.
- To examine the development of fashion retailer's digital maturity and investigate innovative digital fashion trends.

2.4 Research Design

The nature of this exploratory research study is designed in a systematic approach referring to Saunder's (2018) Research Onion theoretical model.

‘Research Onion’ (Saunders, 2018)
Philosophy research:

After careful consideration of all the philosophies within Saunders’s (2018) theoretical framework: positivism, critical realism, post-modernism, etc. Interpretivism research philosophy is most appropriate in the design of this research methodology. Saunders, Lewis, and Thornwell's (2019) observation underline that interpretive paradigm “is the way we as humans attempt to make sense of the world around us”. The interpretivism research philosophy gains a holistic perspective of the individual's beliefs, views, and perceptions on the impact of the pandemic on fashion retailer's digital transformation. This ideology is appropriate for qualitative research and helps gain a better understanding of the concept.

Research Approach:

The research conducted is an inductive style study to examine the research topic of digital transformation in the context of Covid-19 and the fashion industry. The inductive qualitative interpretivism approach is to analyse the data collection to be interpreted in different exploratory ways (Saunders, Lewis, and Thornwell, 2019, P145). In comparison to deductive or abductive, an inductive approach is most the best method and most suitable for qualitative data study.

Research Method:

The design of the study is the qualitative research methodology. “Qualitative research is a means for exploring and understanding the meaning individuals or groups ascribe to a social or human problem” (Creswell, 2008). The problem statement as outlined in chapter one is ‘how the pandemic has affected every aspect of human life and become a major social and business issue’. Qualitative research is the most suitable method to use with the aim of gaining a deeper understanding of the pandemics impact on fashion retailers causing them to accelerate their digital transformation strategies. Qualitative data is a way to comprehend an individual’s belief or experiences on the problem statement. The purpose of the study is to analyse Irish fashion retailer’s advancements in “digital maturity” and gain the participant’s insights on this (Chaffey, 2019). The research method for data collection is through semi-structured interviews, and the self-selection sampling of participants will be discussed in detail further within this chapter.
Research Strategy:

Qualitative research methodology has strong attachments to interpretivism philosophy and the inductive exploratory approach, as this focuses on understanding an individual’s opinions or emotions on a concept, to form a theory. The research strategy is to use ‘multi qualitative research’ as the study is solely based on interviews and secondary data sources, this means using more than one qualitative data collection technique (Saunders, Lewis and Thornwell, 2019, p145).

In this qualitative study, a grounded theory research strategy was used as it entailed interviewing fashion designers to get a better understanding of the impact of the pandemic on the fashion industry. Saunders, Lewis, and Thornwell (2019, p205) observation underlines 'grounded theory' is also refers to a methodology, a method of inquiry and exploration and the result of a research process. This research aims to gain interpretations on fashion's retailer acceleration of digital transformation. The research strategy attempts to draw a holistic perspective from the participant's ideas of fashion's digital transformation in an interview setting. The strategy to implement Braun and Clarke's (2006) thematic analysis to examine findings. The exploratory strategy is to build grounded theory among the data findings.

Time Horizon:

The nature of research is a cross-sectional study, this is due to the time constraints of the dissertation program. The cross-sectional study is beneficial, as it is a fast, inexpensive way to collect data and obtain small synopsis of a point in time such as the pandemic (Levin, 2006). It can captures ‘snapshots’ pandemic effects on the fashion industry and adaptation to digital technology.

2.5 Population

This research study will include the non-population of fashion retailers. The inclusion criteria are a. Irish market fashion retailers, b. a sector of the fashion industry, c. long-established and d. retailers fashions apparels. According to IBISWorld (2017) statistic reports, there are approximately 3,470 clothing retailers in Ireland. This likely increased in the recent
years before the pandemic due to buoyancy in the market post the financial crisis. The fashion retail sector in Ireland is one of the hardest affected, with the closure of stores during the pandemic with multiple lockdowns. The objective is to collect and analyse a small sample of the dominant fashion retailers within the Irish market in order to gain an understanding of the pandemic effects on fashion retail and its digital processes from fashion experts (such as designers etc.) employed by these retailers on the topic.

2.6 Sample of Participants

Having researched the wide range of retail outlets that have worked to digitally transform during the COVID-19 pandemic, four interviews have been selected for detailed analysis. Each interview presents the digital transformation and COVID-19’s impact on Irish fashion retailers through different lenses.

Bertona’s (2018) observation underlines that fashion has historically been a design-oriented business model. This is why the research has demographic criteria for participant occupation as fashion designers. These selected designers are immersed at the centre of the commercial fashion retailers and witness first-hand the effects of the pandemic on their industry. Age and gender is not an essential factor to the non-population. The research demographic requires fashion retail employment in the Irish market with a strong background and experience of the fashion industry. The research consists of interviewing designers who working in the headquarters functions of leading fashion retailers operating in the Irish market. This is so the participant has expert knowledge on the research topic.

As this is a cross-sectional study, the most challenging aspect is accessing suitable participants that have good representation to the selected non-population. Not all businesses approached could agree to participate. However the small sample will gain valuable insight of fashion expert's experience and perceptions on the topic. The advantage of this research is capturing first-hand insights of participants working directly at the top level of the fashion retail industry. This will help understand the ‘new normal’ of fashion retail in relation to digitalisation.

The recruitment strategy is to sample a selection of voluntary participants via networking through the LinkedIn platform. The recruitment approach is self-selecting non-
probability sampling. The researcher is fully aware that self-selection sampling can be biased in data collection, however critiquing participants with appropriate criteria is necessary to gain relevant insights into the topic.

Selection of Participants:

<table>
<thead>
<tr>
<th>Selected Participants</th>
<th>Job Title/ Fashion Authority</th>
<th>Retailer</th>
<th>Retail Criteria: Fashion Retailer within the Irish Market</th>
<th>Has Fashion related experience during the pandemic</th>
<th>Location of Experience</th>
<th>Strong Background experience and upper level in the fashion industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant A</td>
<td>Designer</td>
<td>H&amp;M</td>
<td>Yes</td>
<td>Yes</td>
<td>Head Office Sweden</td>
<td>Yes</td>
</tr>
<tr>
<td>Participant B</td>
<td>Designer</td>
<td>Dunnes Stores</td>
<td>Yes</td>
<td>Yes</td>
<td>Head Office Ireland</td>
<td>Yes</td>
</tr>
<tr>
<td>Participant C</td>
<td>Senior Designer (and Buyer)</td>
<td>Styltex (Oasis, Topshop, Dorchy Perkin, Dunnes Store, Asda, George)</td>
<td>Yes</td>
<td>Yes</td>
<td>Head Office Ireland</td>
<td>Yes</td>
</tr>
<tr>
<td>Participant D</td>
<td>Senior Designer</td>
<td>Dunnes Stores</td>
<td>Yes</td>
<td>Yes</td>
<td>Head Office Ireland</td>
<td>Yes</td>
</tr>
</tbody>
</table>

2.7 Data Collection

Research and Interview Design

A sample of in-depth semi-structured interviews will be conducted. According to Martin (2019) “interviews are a fundamental research method for direct contact with participants, to collect first-hand personal accounts of experience, opinions, attitudes, and perceptions". Interviews have the capability to examine an individual's beliefs on a particular phenomenon. It is also a quick, inexpensive technique for data collection. This data collection will gather data from interviews with self-selected fashion designers who are constantly researching fashion trends, competitive rivalry, innovative marketing methods, and where the future of fashion going. This is why it is important to use this qualitative data collection. It will capture data on the direct experiences of these participants on the research topics in line with understanding the 'new normal' of fashion retail.

Interviewing has a strong association with the exploratory interpretivism nature of this research. The interviews are intended to be informal and semi-structured, using everyday colloquial language to avoid any confusion on terminology. Accessing participants is slightly more difficult with the Covid-19 restrictions and even the interviews themselves had to be
conducted via digital means in a virtual meeting setting. The sample research consists of four voluntary participants with a professional background in the fashion industry. Video interviews are preferred over textual format in the study, as the real-time interaction can allow for more comprehensive data collection. Virtual video interviews have the advantage and capability to observe body language too and have the option to ask off-script questions to prompt responses into a detailed explanation, this allows for greater clarity in the qualitative data gathered.

**Questions design**

The design of the research interview uses a set of open-ended questions relevant to the subject and correlates with the nature of the exploratory approach. As Saunier, Lewis, and Thornhill (2019) underlines “an exploratory study is a valuable means to ask open questions to discover what is happening and gain insights about a topic of interest.” Open-ended questions have the advantage to freely explore and discuss the topic when compared to close-ended questions. Some of the sample questions for the interviews consist of: “How do you think the pandemic impacted the fashion industry?” and “How has technology helped improve services and the customer experience in fashion retail and why?” For full detail please see appendix B.

**Secondary Data**

Secondary data will be sequentially included in the research study. Secondary data supports, enriches and brings credibility to the topic findings. This data collection aims to gather secondary high-quality accurate data from academic material, specialised data analytics, and statistical businesses or governmental publications as well as from reputable professional sources such as; McKinsey, Statista, WHO, WGSN, etc. The advantage of this type of data is that it’s efficient, quick and inexpensive to obtain such information to support primary data.

**2.8 Apparatus**

The apparatus for the data collection were mainly digital assets, the following apparatus will be used in the study:

- Email is used for correspondence and collecting participants' consent signatures. Before the interview information, consent forms were sent to participants, and data consent was retrieved.
• Zoom is used to conduct virtual interviews. This remote tool was the most suitable digital solution to performing interviews with the pandemic restrictions in place.
• Microsoft Word dictation tool assisted with the transcript of audio recording and translating in a textual data format.
• NVivo is a data analysis software. It can efficiently process large data set and assist in thematic analysis. This is an essential apparatus for the study as it can assist with identifying themes quickly and gathering relevant data extracts.
• Google Drive storage was used for data collection storage.
• LinkedIn is used in the recruitment process and to gain initial access to the participants.

2.9 Procedure

*Interview Procedure*

‘Pilot-testing’ interviews will be implemented before the official interview. This avoids common errors, ensures the apparatus is working and designed questions are suitable. As well as information and consent forms will be given to voluntary participants before the interview. Due to pandemic restrictions, the interview method is a systematic approach that gives participants the option of recording a video or audio-only virtual interview. It is recognised by the researcher that using the Zoom platform will eliminate the drawbacks of in-person interviews for instance location agreement or distance barriers, commuting time, and pandemic restrictions, etc. The procedure to is inform participants of the interview structure and nature of the study. The study concludes with four interviews depending on the quality of initial interviews a follow-up interview may be required.

The interview procedure is to ensure professionalism, comfort and flexibility for participants taking part in the study. The interviews will be conducted in a quiet, comfortable environment, this is ensuring the better quality of recording data and for participants to speak openly. An average of forty-five minutes is allocated for each interview. A full outline of the interview questions can be found in ‘Appendix B’. A variety of questions where designed to collect different information such as demographic, data on variables affected by Covid-19, fashion retailers, digital technologies and channels. Opened-end questions are included to encourage the participant to speak freely and expand on the topic should they wish to. The same set of questions will be asked of all participants; therefore, the qualitative data will be used to analyse responses, create grounded theory and identify potential themes.
Data Collection Procedure

All interviews will be transcribed from audio to textual data using the word dictation apparatus. The data collection procedure is to compile the data corpus obtained from interviews and secondary sources. The next process is to categorise information into a data set, then by analysing the data set, the researcher explores and identifies key data extracts and interprets potential themes. The NVivo qualitative software will be used to decipher data quickly and effectively. NVivo specialises in assisting in thematic analysis, this will be discussed in more detail in the data analysis section.

2.10 Ethics

The study needs to ensure potential ethical issues of privacy, confidentiality, informed consent, potential risk, transparency are acknowledged and dealt with appropriately when conducting interviews (Allmark, 2009). For the ethics of the study, participants will remain anonymous, only the job title and prior company work experience will be revealed subject to consent. Data extracts or quotations from the interviews will be used in the findings of the study.

Consent

For ethical considerations and best practice, consent for the use of the information, comprehension and confirmation of their willingness to participate will be requested from all participants. Participants will be notified of the purpose of the information collected and asked to sign a letter of consent. To summarise consent will cover recording of the interview, publication of data extract / quotations and occupation title.

Data Protection

Any data collected will be used for the research study only. For good GDPR practice, the participant will remain anonymous in any publications of the research. Any personal data gathered will be stored securely and encrypted with strong password protection and kept confidential to minimise risk. All primary data collection will be deleted after the dissertation has been completed and appraised by DBS.
**Benefit**

It is anticipated that the study may help businesses implement to improve their digital transformation or assist in designing effective marketing strategies through its informative research. Should any benefits of the data be identified for any of the participants during the research, this information may be shared with the participants, undertaking that it does not negatively affect others.

**Minimise Risk**

There is no immediate concerns or risk in taking part in the study, as the research topic is not a controversial issue. Any conflicts of interest by any means are to be avoided and all measures are taken to ensure minimal risk to the integrity of the study. See ‘Appendix A’ for full details on the ethic and fundamental precautions that will be taken in the study.

**2.11 Limitation of research**

It is recognised that a cross-sectional study has limitations and a longitude study with multi-mixed methods can bring richer research. However, there are benefits of conducting a cross-sectional study, as it is a quick inexpensive way to capture ‘snapshots’ of the concept.

It is understood the short timeframe is a factor in some research limitations, seeking and accessing relevant voluntary participants during a pandemic is time-consuming and restrictive. However, capturing a small sample of the population is critical to understand the occurring pandemic effects and the reshaping of the fashion retail model. Ideally there would be more sampling giving richer knowledge to the study. It is recognised that this is a necessary limitation in this research study.

Qualitative research has capabilities and some limitations, as it is tends to be a time-consuming and exploratory method. It is a non-statistical representation where most of the data collection and control is relied upon what participants say. Qualitative research does have the capability to understand and value the participant's views or feeling's on a human or social problem. It is not factual or numerical data in the measurement of variables. It is anticipated
that the research can potentially find themes patterns correlation in participant’s views. However this may not always be the case hence the data is less controlled by the researcher.

2.12 Qualitative Data analysis

This section will focus on the method of how themes emerged in the study of ‘COVID-19 the dynamics of digital transformation: reshaping the fashion retail’. The research will utilise Braun and Clarke’s (2006) thematic analysis and Jefferson's Interpretivism approach to digital transformation as a way to understand how has the Covid-19 Pandemic has affected the fashion industry and how has it has impacted retailer’s digital transformation?

Thematic Analysis

"Thematic analysis is a method for identifying, analysing, and reporting patterns (themes) within data. It minimally organizes and describes your data set in (rich) detail. However, frequently it goes further than this and interprets various aspects of the research topic" (Boyatzis(1998); Cited in Braun and Clarke, 2006).

This qualitative study will implement a thematic analysis approach. Thematic analysis has a strong association with qualitative exploratory research and grounded theory. This is why the analysis, data corpus, and theory were implemented in the study and research strategy. This analysis approach is adaptable and requires searching for themes, patterns, and common variables within qualitative research and has a strong attachment for grounded theory (Braun and Clarke 2006). The fundamental principle of thematic analysis is to categorise and create a full examination of the data set and interpret views of data extracts. This analysis will be used in the hope to draw conclusions from the data findings. Therefore this research study will use the Braun and Clarke’s thematic analysis.

Braun and Clarke’s (2006) thematic analysis theoretical framework

The thematic analysis six stages are as follows:

1. **Familiarisation** – The researcher actively engages and reads the data corpus. the research takes notes and interprets concepts. Additional to this stage, the Jefferson's interpretivism approach is implemented to transcript data and ensure the precision of the data (Braun and Clarke2006).
2. **Making initial codes** - Extracting and categorising data items into a data set and organise initial coding, this process is accomplished both manually and with this assistance NVivo apparatus.

3. **Finding Themes** - Identifying latent themes grouping data into more defined data sets of themes.

4. **Reviewing Themes** - The researcher considers which data extracts correlate with themes

5. **Defining Themes** - Detailed themes are identified, clearly defined and labelled

6. **Creating the report** - This concludes finalising and writing up the analysis report.

2.13 Selecting Themes

This research study is an exploratory, inductive, basic approach. The grounded theory and theme will be acquired within the data collection. Braun and Clarke’s thematic analysis will be implemented to identify themes. However, this method does not clarify the exact measures used by participants, it only underlines themes “in terms of the number of different speakers who articulated the theme” (Braun and Clarke, 2006). As this research has a small sample with a specific non-population, the themes considered will be defined by any overlap of participants. It will also measure the number of data extractions relating to a theme. The more correspondences of a theme mentioned by multiple participants will more likely lead to it being chosen for the potential themes. These participants have high relevancy and direct experience in the fashion industry and the pandemic effects so it is anticipated participant's data items will intersect in the selection of key themes.

**Results**

2.14 Introduction of findings

This section aims to outline the exploratory pathways that led to the findings of the research. It will clarify more on how the data corpus was obtained, processed, and analysed. A representation of the research findings and data analysis will be exhibited in this section.

The findings of the procedures are the followings. The data collection was gathered from a sample of virtual interviews using Zoom. The researcher contacted multiple self-selected
participants that were appropriate to the sample criteria through LinkedIn. The interviews were obtained from a sample of head office designers employed by leading fashion retailers. Gaining access to suitable participants during the pandemic and finding those willing to participate was the most challenging aspect of the study. With successful networking, the research study obtained in-depth interviews with four professional fashion designers that have a rich background of knowledge on the research topic, each designer has worked in the sector for many years and witnessed at first-hand the distribution and effects of the pandemic on the Irish fashion market.

2.15 Findings of research questions

To achieve the research aim and objectives, a set of twenty-three open-ended questions was asked to all participants. The questions were asked to collect data and measure the overall perceptions of the effects of Covid-19, fashion’s digital transformation, digital channels, and technologies. This data collection was gathered for investigation and analysis. The sub-questions were designed to answer the key research question.

2.16 Data method and analysis

The data collection gathered from the interviews were in audio recording format. Using Jefferson’s interpretivism approach the audio recording was transcribed into textual data, using the method ensured ‘accuracy’ and clear transparency of data (Braun and Clarke, 2006). The interview transcripts were then explored and the data was processed through Braun and Clarke’s Thematic analysis framework. In this approach the six stages of the thematic analysis were implemented. This included the following: familiarisation of data, making initial codes, searching for themes, reviewing themes, defining themes, and conducting the report (Braun and Clarke, 2006).

2.17 Stages of Thematic Analysis (Braun and Clarke 2006)

2.17.1. Familiarisation (Braun and Clarke2006; Terry, 2012)

For the first phase of the thematic analysis, the researcher actively studied all interview transcripts and observed the participant's perspectives on the concept. While familiarising with the data corpus, general notes were taken on the ideas and concepts that arise in the data collection. Figure 1 displays a sample of the notes were taken from the interviews.
Effects of the pandemic, government and social restriction, closure of store and loss of sales, supply chain delays and cancellation

Reshaping of Irish fashion retail landscape - “overnight shift to online” adopting new strategies, major key players store closures

Fashion retailer digital transformation maturity – Rapid app development, self-check, QR Codes, digital fitting room, website developments- 360 videos, etc.

Fashion retailers digital immersing and seamless integrating consumer’s devices and digital activities, gamification trend, virtual reality experimentation, online and offline interactive shopping

Fashion retailer surge of activity on social media, investing in video content and implementation of social shopping.

Increase of new customer's and behavioural changes during the pandemic – social distance, online adaptation and new buying behaviours

All participants believe that retail will not revert to its traditional ways in the ‘new normal’.

2.17.2. Initial coding

For the initial stages of the research journey, the researcher began actively examining the transcripts and deciphering the codes and continue general notetaking. The researcher actively studied all interview transcripts gaining further understanding of the participant's perspectives on the concept. The researcher explored the data in depth in order to interpret, seek meaning, and identify patterns. Each quotation was analysed thoroughly and initial codes were applied. Braun and Clarke’s (2012) method was referred to while coding and deciphering each of the transcripts meaning as shown in the sample below:
Figure II: Initial Coding Transcript Participant A sample

<table>
<thead>
<tr>
<th>Transcript</th>
<th>Codes</th>
</tr>
</thead>
</table>
| “People would like joggers comfys, your stay at home comfy clothes and that people were buying like basics” | • Impact of Covid-19 - stay at home-seeking comfort
• Change in customer behaviour and purchasing behaviour |
| “There’s an ‘in-store mode’ in the app where you can choose the store that you're in, the menu can check items stock levels with the QR codes on labels there in the app. You can check if they've got your size.” | • Fashion Retail digital transformation
• App developments in fashion retail
• Covid-19 impact - Social distance- limit contact
• Efficiency- new operations
• Seamless integration connectivity between customers devices and in-store experience
• Online and offline channels |
| “H&M teamed up with TACA BOCA. Which is like a kid’s game world that you go around and you play around in and they had a whole range of T-shirts. The kids could buy online in the Taca Boca store the digital version of a T-shirt that a child could buy in a real store. So that their avatar in the game could be wearing the same T-shirt as the kid is wearing in real life.” | • Immersing in customers omnichannel
• Fast-fashion retailers enhance digital maturity
• innovative fashion digital marketing
• Gamification/virtual/augmented Reality
• online and offline connection
• Seamless integration – gaming devices |

2.17.3. Development of themes

After familiarising the transcripts manually, the data corpus was processed into data sets through the Nvivo data analytic software. This way the data sets became more manageable, searchable, efficient, and easier to explore the potential theme. This advanced software assists with quickly, managing textual data, deciphers, and analyses codes, patterns, that help recognise themes efficiently. Each interview transcript was examined and data extracts were
categorised into digital codes. A sample of the code sets framework and the initial draft thematic maps were formed for all interview transcripts.

<table>
<thead>
<tr>
<th>Nodes</th>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Digital Transformation</td>
</tr>
<tr>
<td></td>
<td>Gaming Trend</td>
</tr>
<tr>
<td></td>
<td>Retail Digital Maturity</td>
</tr>
<tr>
<td></td>
<td>Seamless integration</td>
</tr>
<tr>
<td></td>
<td>Social Media</td>
</tr>
<tr>
<td></td>
<td>Impact of Covid-19</td>
</tr>
</tbody>
</table>

*Nvivo Initial Codes framework*

Continuing on Braun and Clarke’s (2006) sequential method, the study developed and sought potential themes. The researcher created a basic structure, formed within the data and connecting patterns in the participant's dialogue. The researcher began organising and managing data sets.

The next stage was to review and assess a variety of themes. Mapping of drafting themes was conducted. The potential themes were linked with coded transcripts. Subthemes emerged while organising the data. The researcher interpreted data and selected interesting aspects in the findings. The researcher began drafting a thematic map to examine areas of exploration and began creating subthemes that connected to coded transcripts. This initial map identifies if there is enough relevant data to support findings. All coded transcript was organised in an attempt to form relationships, meaning and patterns in the data.
2.17.4. Reviewing themes

Subsequently, many potential themes were identified, and some were eliminated in the development process. After reviewing all themes, the research proceeded to select and assess potential key themes. The researcher refined each theme and conducted a report for findings and discussion. Four key themes emerged for further examination and exploration. These themes were developed and established more before final reviewing. The chosen themes were articulated by all participants. Each individual displayed aspects of the potential theme displayed below key codes were extracts in the reviewing process.

<table>
<thead>
<tr>
<th>Exhibit III: Four potential themes emerged from the study findings key codes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Theme 1:</strong> Covid-19 impact: Fashion’s adaptation to digital transformation</td>
</tr>
<tr>
<td><strong>Theme 2:</strong> Seamless integration and fashion retailer’s development of digital maturity</td>
</tr>
<tr>
<td><strong>Theme 3:</strong> Innovative digital transformation trends among fashion retailers</td>
</tr>
<tr>
<td><strong>Theme 4:</strong> Fashion retailer’s utilisation of social media</td>
</tr>
</tbody>
</table>
2.17.5. Defining themes

The primary research question ‘how has the COVID-19 pandemic affected the fashion industry and how has it impacted retail digital transformation?’ and sub-questions were referred to as themes were defined to ensure relevancy. The number of participants who expressed aspects of a particular theme was considered and the research was measured in the selection process and finalisation of the defined themes as shown below:

<table>
<thead>
<tr>
<th>Themes</th>
<th>Number of Participants referring to aspects of the theme</th>
<th>Number of references coded</th>
</tr>
</thead>
<tbody>
<tr>
<td>The pandemic effects and fashion’s digital transformation</td>
<td>4</td>
<td>81</td>
</tr>
<tr>
<td>Seamless integration and fashion retailer’s digital maturity</td>
<td>4</td>
<td>24</td>
</tr>
<tr>
<td>Gamification and Virtual reality</td>
<td>4</td>
<td>25</td>
</tr>
<tr>
<td>Fashion retailer’s utilization of social media</td>
<td>4</td>
<td>24</td>
</tr>
</tbody>
</table>

- COVID-19 impacts of in fashion retailers
- Retailer’s reaction to the closure of brick and mortar channel.
- Development of channels
- marketing tactics immersing into new areas of digital space
- integrating with customers devices
- online offline experience
- retailer’s digital solutions for pandemic effects
- New functions of fashion retail stores
- purchasing loyalty, games emerging within the customer journey
- innovation methods of buying immersing into gaming environments.
- virtual and augmented reality
- Fashion retailer’s Development of social channels
- Social shopping
- Influencer and methods of product promotion
- advancements
- Video content
2.18.1 The pandemic effects and fashion’s adaptation to digital transformation

This is in line with chapter one; understanding the effects of the pandemic with fashion retailers ‘survival and acceleration of digital transformation’ (Li, 2021; Casini and Roccetti 2020; Santo and Sibel 2021).

This theme was frequently mentioned by all participants and evidently, it is crucial in partially answering the research aim. From the data results, all participants mentioned how this theme pertains to their experiences, their perceptions of the pandemic effects and how fashion retailers adapt to digitalisation. Each participant represented the theme and highlighted interesting aspects of the theme as shown in the table below. Collectively the data extractions capture a greater understanding of the research aim and objectives. This will be discussed in further depth in chapter 3.

<table>
<thead>
<tr>
<th>Theme</th>
<th>Details</th>
<th>Transcripts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pandemic effects and Fashion’s digital transformation</td>
<td>This theme analysed the key impacts of the pandemic on fashion retailers. Fashions adaption to digital transformation. Observing how fashion retailer's adaption through digital technology and accelerated their digital transformation stages.</td>
<td>Participant A: &quot;there was huge, nearly like an overnight shift to trying to get stock out of stores and onto online channels and online markets.” Participant B: &quot;it was a really stressful time to work in the fashion industry, with cancellations, loss of stock, and delayed shipments” Participant D: “from high-end brands to the high street. Fashion weeks and catwalk shows all over the world were cancelled and they forced designers to come up with new innovative ways to show their collections”</td>
</tr>
</tbody>
</table>

2.18.2 Seamless integration and fashion retailer’s development of digital maturity

Another theme that frequently emerged from the data corpus was the digital transformation concept of seamless integration and development towards digital maturity. The
observations from all participant's underlined the development of omnichannel and the idea of advancing in digital maturity, as well as how retailers are integrating with customer's devices and merging online and offline. It was recognised and confirmed in the data findings that many fashion retailers developed shopping apps during the pandemic. These apps are integrating with customer devices and can also interact with and enhance the in-store experience. Innovative methods have been found to reach customers through all means available including, social media, virtual gaming, optimisation of websites, apps, email, etc. Below is a sample of data extracts from transcripts where participants discuss the theme, this will be analysed further in the discussion section.

<table>
<thead>
<tr>
<th>Theme</th>
<th>Details</th>
<th>Transcripts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seamless Integration/</td>
<td>Fashion retailers are progressing further in their digital maturity.</td>
<td>Participant A: “there’s much more emphasis on trying to link the offline</td>
</tr>
<tr>
<td>Digital Maturity</td>
<td>Retailers are innovatively and seamlessly integrating with customer's</td>
<td>and online”</td>
</tr>
<tr>
<td></td>
<td>devices/IOTs as a means to build a strong customer relationship or</td>
<td>Participant B: “kind of combining … in-store experience and online … shopping</td>
</tr>
<tr>
<td></td>
<td>obtain sales. Retailers are starting to merge the online and offline</td>
<td>with QR codes through apps”</td>
</tr>
<tr>
<td></td>
<td>experience.</td>
<td>Participant D: “it was necessity to go digital as it was the only way to</td>
</tr>
<tr>
<td></td>
<td></td>
<td>reach like a customer, but now brands understand the value having an online</td>
</tr>
<tr>
<td></td>
<td></td>
<td>presence has.”</td>
</tr>
</tbody>
</table>

2.18.3 Innovative digital transformation trends among fashion retailers

From the data analysis, several concepts of gaming scenarios were being associated with fashion retailer's digital transformation. These findings emerged from all from participants and is why this theme was defined and selected for discussion. Fashion retailers are innovatively experimenting through new digital virtual realities in order to create interactive sensory-rich online customer experiences. Trends are emerging of virtual and augmented reality products. ‘Gamification’ is also on the rise.
### Gaming digital trend /Virtual Reality/ omnichannel

An innovative digital trend emerged with fashion retailer’s enhancements of digital transformation. Fashion brands are experimenting with innovative methods of purchasing and enhancing the customer experience through the virtual reality or gamification system of buying.

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### Social Media

This theme examining the relationship and roles social media plays on fashion retailers. There are many utilisation of social media in how fashion retailer

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#### 2.18.4. Fashion retailer’s utilisation of social media

Bertona’s (2018) observation underlines the “rise of screenwear” when discussing fashion on social media platforms. With fashion's digital transformation, it is no surprise a theme of social media materialised. Social media platforms display and promote clothing products through aspiration imagery or video content. All participants emphasise the important role social media plays with fashion brands. Fashion retailers are utilising these channels in innovative ways to reach their target audience. Many examples are contained in the data transcript such as social shopping, through influencers, videography, virtual avatars, story posts.

Social media platforms such “Tik Tok has grown especially during the pandemic and it is used for fashion because it's a visual platform and there are so many influencers doing, like, shopping halls and trying clothes on but then Tik Tok is really creative … Like clothing transitions … and how they styled things” (Participant B)
market their products and obtain sales such as the development of creative video content, social shopping, influencers, and social shopping.

| product online they're really utilising those technologies”
| Participant C “any fashion brand, looking to sell more through Tik Tok/Instagram is the way to go…There's a lot of Instagram. stories behind emotional marketing and influencers” |

In summary of the findings, all participants had a strong background in fashion and in the commercial experience of working with some of the top retailers in Ireland. The interviews provided strong insights into their first-hand experiences or perceptions on the impact of the pandemic fashion industry. The participants offered insights on fashion digital transformation and emerging trends, the thematic approach of data sets helped explore this. The key themes will be examined and discussed in-depth in chapter 3.
Chapter Three: Discussion of Established Themes and Analysis

3.1 Introduction

Chapter Two provided an overview of research findings and analysis on fashion's digital transformation during the pandemic. The research study utilised Braun and Clarke's thematic analysis, this resulted in four key themes that emerged from the participants. This chapter will focus on examining the four interviews in-depth to understand how the pandemic impacted the fashion industry and forced fashion retailers to adapt their IT strategies and further their digital transformation stages. It is recognised that many retailers accelerated their digitalisation plans in order to survive the pandemic (Li, 2021; Casini and Roccetti 2020; Santo and Sibel 2021). As the pandemic progresses and innovative digital solutions become available the dynamics of the fashion retail model are continuously evolving. As stated previously this research aims to analyse the impact of Covid-19 on the fashion industry and how retailers have adapted to cater to an online audience through digital transformation. This section will investigate the concept further through an in-depth discussion of the themes established in Chapter 2.

3.2 Research findings

The data analysis from interviews give strong insights and help us to understand how fashion retailers have adopted digital processes and show how traumatic the pandemic has been on the fashion industry. Each individual frequently articulated themes that related to fashion’s digital transformation. Themes emerged where participants discussions intersected showing common ground within the digital transformation of their personal experience working within the fashion field. All participants elaborately discussed the effects of the pandemic on the industry, which caused fashion retailers to rapidly adapt and enhance their digital maturity. The research findings include the fashion retailers current situation, the pandemic effects, followed by fashion retailer's utilisation of digital assets, processes, channels, developments and innovative uses of digital technology. While the pandemic will eventually subside, the fashion retail landscape and competitive rivalry have changed forever. The importance of the study is to understand and help identify ways businesses can adapt or accelerate in their digital transformation. This is essential for survival of the 'new normal' future of fashion retail and will be discussed further in the themes that have been established.
3.3 Themes

While examining fashion's digital transformation, as well as conducting and analysing interviews with participants immersed in the Irish fashion industry, several themes were established. This chapter aims to focus on four core themes which emerged through the data collection and qualitative thematic analysis. It will on continue on the final stage of Braun and Clarke's (2006) thematic structure in producing the discussion report. It will also utilise Berger and Luckmann’s (1966) interpretive approach as a way to understand and interpret how fashion brands innovatively enhanced in digital maturity during the pandemic. “The interpretive approach is a term that aligns with a particular perspective on organisational reality, one based on the belief that reality is socially constructed or made meaningful through actors’ understandings and interpretations of events” (Berger & Luckmann, 1966; cited Banghart, 2017). This approach will help clarify and answer the primary research question; How has the Covid-19 Pandemic affected the fashion industry and how has it impacted retail digital transformation? The data findings presented the key themes below, which were frequently articulated by all participants. This selection of themes help to achieve the aims and objective of the research study. The key themes are the following:

2. Seamless integration and fashion retailer’s development of digital maturity
3. Innovative digital transformation trends among fashion retailers
4. Fashion retailer’s utilisation of social media

3.4.1 Covid-19 Impact: Fashion’s adaptation to digital transformation

The data results showed that the pandemic has caused major distress throughout the entire fashion industry, this supports and confirms similar accounts presented in the literature review. The value of the research is that, it is additional expansion of the theme and provides some of the gaps in knowledge from the perspective of fashion retailers in the Irish market. All participants presented their interpretations of events, describing dramatic changes through the lenses of the fashion retailers and as well as a customer. The highest results revealed a total of 84 exact quotations heavily discussing how the pandemic rapidly impacted the fashion industry and the almost ‘overnight shift’ to digital channels. The data shows a distinct observation underlining that “in comparison, to other EU countries Ireland had the longest lockdown, …
the Irish retail market and for Irish consumers, they've had to stay with online longer”. Therefore, adapting and enhancing in their digital transformation stages became crucial for businesses to survive the pandemic. It was observed that all participants presented emotional views of stress working in the fashion industry caused by the pandemic. Participants discussed concerns about job security with retail cut-backs, feeling ‘unsafe shopping in stores, and ‘uncontrollable’ disruptions in supplier chain and store operations. The data results present massive disruptions and cancellations in the superior level of the supply chain, as well as disruption among retailers such as closure stores, temporary removal of the brick and mortar channel and acceleration digital transformation strategies. The data results showed that across Europe ‘H&M at one point had 3500 of their 5000 stores closed’. It was notable that all participants mentioned that the pandemic has had ongoing and changing effects on the Irish fashion retailer landscape and caused its business model to reshape. Previous research Casini and Rocetti’s (2020) agrees that fashion retailers tremulously suffered and the landscape will not revert completely to the way it was. Most participants mentioned that a major impact of the pandemic on the Irish retail landscape has been the permanent store closures for Topshop, Debenhams, Gap, Dorothy Perkins, Oasis, and Pamela Scott. Upon further investigation some such as Topshop and Gap have altered their model, now only existing as an online website or in a third-party brand collaboration like the ‘Next website’ which evolved during the pandemic. During the interviews, the Grafton Street retail landscape was described as a ‘ghost town’ with the Covid-19 restrictions, temporary or permanent closure with many empty stores. The pandemic impact continues, one participant believes Monsoon, Accessorize and Ted baker may be next in line to close and the high street will not be the same.

It seems, half the participants observed some positive impact of retailers from the pandemic. One of the observations underlined ‘if you're a supermarket fashion retailer, and you have the stock in place and relevant, modern designs, you did quite well from the pandemic’. The participants working in this type of retail model, both stated that they have come out the pandemic in a stronger position. The results showed that the pandemic had a positive effect on retailers such as Dunnes Stores, ADSA, Sainbury’s. As the advantage of this model was they classified as an essential store and remained open during the pandemic with some instore restriction. The result confirm they gain a lot of their competitor’s customers. There is little evidence in academic literature supporting and confirming this idea, this is why it was crucial to investigate research on this topic, as it is still unexplored.
The results underline that it is now 'essential' for business 'survival' to implement a digital transformation plan. This bears a similarity to the accounts in the literature review that support views on the necessity to accelerate digital maturity by means of survival (Li, 2021; Casini and Roccetti 2020; Santo and Sibel 2021). All participants in the study spoke about the value and importance of implementing digital processes and developing online channels such as websites, social media, email, otherwise fashion retailer would be 'grounded to a halt' with store closures. Even after stores reopen, the nature and importance of digital channels is such that for most fashion retailers, if they don’t keep up with the competition they will lose out. The secondary data findings, from a recent WGSN (global fashion trend analysis) report supported this view, its observation underlines that immersing in the high levels of digital transformation maturity is "crucial to future survival for all brands and businesses” (WGSN, 2021). Previous research Li’s (2021) notes that the pandemic is a 'catalyst' for retailer's digital transformation. The research sample of fashion retailers demonstrations Li’s observation, the data discussed narratives of these companies reacting to the pandemic and how they are enhancing their digital transformation plans and investing heavily in digital technologies.

The continuous social restrictions forced fashion retailers to invest more online. Retailers had no choice but to improve their digital assets, develop plans for omnichannel expansion and enhance the online digital experience for their customers. All participants mentioned fast-fashion using these digital solutions to help with the implementation of social distancing restrictions. New digital services emerged with rapid development of apps, usage of QR codes, self-serve checkouts, online appointments, click and collect, etc. This will be examined in more detail in the next theme. The data results discussed other digital features that emerged too such as virtual queues, 3-D virtual avatars, 360 videos. These concepts were viewed as trying to 'mimic the in-store experience' through online platforms. Previous research concludes that it is difficult to translate tactility online (Saravanan, Alves, and Ribeiro 2020). Half of the participants agree on this view stating that although fashion brands have improved their digital platforms drastically, the downfall is that it still does not replicate the tactile, sensory experience which in-store shopping provides.

As Bertola’s (2018) observation underlines fast-fashion retailers are slow adapters to digital transformation and utilising technologies. The data results argue that Bertola’s view is becoming outdated, it isn’t just haute couture eager to experiment with innovative technology. All Participants agreed that fast-fashion is still in the initial stages of ‘extended enterprise’ in
digital maturity and luxury brands are further along the spectrum (Chaffey, 2019). However, the data result included fast-fashion examples such as the H&M’s collaboration with the Toca Baca PlayStation game, the Simona Rocha collection interactive video and the Adidas partnership with the FIFA Xbox and PlayStation game. These examples display that fast-fashion aren’t as a slow adapter to technologies as they used to be and are catching up with luxury brands technology innovations. The data result concluded that fast-fashion digital transformation plans that may have taken ‘ten years’ to implement are being implemented now.

The data results showed that the pandemic forced fashion store closures and cancellation of catwalk events. One participant’s perception underlines "they forced designers to come up with new innovative ways to show their collections". However, in contrast with Bertona’s (2018) argument that 'historically' fashion was a designer-oriented business model, the interpretation of the findings is that the fashion retail model may have altered during this period and is at least a combination of design and customer-driven models. It is clear that designers still play major role of importance in the business model. The pandemic pushed designers to envision creative digital solutions in order to display their collection and reach the target audience.

The data collected showed that most retailers are now creating more engaging content, developing the user experience and customer online journey. Siebel argues that most fashion retailers who do not adapt to digitalisation are likely to fail. Three of four participants agree that the ‘new normal’ retailer stores are going to become more experiential, some in-store concepts emerged such as sustainability or wellness sections and more interactive or gamified digital services. Participant C’s observation commented from a Primark meeting with the CEO stating ‘it is all within stores” … they still won't be going online. They don't agree with it, because the “footfall makes much more money”. Primark is an outlier to the industry and remains a non-eCommerce website and are considered to be a slow adapter to digitalisation. The data highlights that stores will remain an essential and dominant channel for some retailers. This perception disagrees with Siebel’s view, digital investment is not sustainable for this low price fast-fashion business model. It is also considered a strategy to set themselves apart from competitive rivalry.
3.4.2. Seamless integration and fashion retailer’s development of digital maturity

All participants strongly narrated that for fashion retailer’s, the temporary removal of the brick and mortar channel caused a ‘rapid overnight shift’ to online. It caused retailers to develop and optimise all digital channels. All interviewees agreed with the Li’s(2021) interpretation that fashion retailers are accelerating their digital transformation plans during the pandemic. The participants cited many examples of retailers who developed new digital processes. Two out of four interviews identified ASOS and Amazon as key players when it comes to advanced digital maturity and who had a ‘monopoly’ or superior advantage during the pandemic as their business models seamlessly integrates with customer devices and they solely operate online. They continued to develop and implement efficiencies. Most participants believe, in line with chapter with regard to seamless integration and extended enterprise, that Amazon is seen to have the most advanced digital operating systems. However, Zara is still considered to have best fashion product and now a leading competitor.

In the data results, all participants agreed that retailers have prioritised development of their website to create a more seamless user experience and navigation flow. For example, comments like X or Y business “invested and improve their online sites and are improving their navigation, so that it's easier for the customer’s online journey”. The interviews discussed variety of website advances such as search engines, navigation, chatbots, automation, algorithms and artificial intelligence (AI). It seems digital systems are becoming ‘more accurate’ and seamless in their results.

In the discussion, participants recognised that there some disadvantages with online shopping such as clothing sizing and misrepresentation of products. Three of four interviews highlighted that the online retail experience has advanced and created ‘better representation’ of products and models with the addition of engaging features such as 360, fit or catwalk videos, etc. Fashion retailers are advancing in digital transformation and are trying to overcome a key negative barrier associated with online shopping. The data results presented some fashion retailers innovatively created a more interactive experience through the creation of avatars. The customers seamlessly configure themselves as virtual avatars and as they navigate through the website they can select items to try on virtually.

The data results showed retailers are rapidly developing their digital transformation strategies, by integrating customers IOT devices and in-store experience. The discussion of the
'new normal' future fashion retailer emerged. Previous research by Casini and Roccetti's (2020) underlines that retailers are becoming 'mere warehouses'. This is not the view of the participants. Three of the four interviews consider the 'new normal' of retailer will eventually revert onto instore, shopping will become more of an experiential 'activity' with additional digital transformations such as instore apps, digital fitting room, personalisation, interactive screens. In parallel with chapter one, all participants agree with Li in that the landscape of retailer will not completely revert back to the way it was, Li’s (2020). Previous research by Bertola’s (2018) underlines that, some retailers have optimised their omnichannel, every stage of the customer experience integrates online with stores. This observation has emerged even with fast-fashion retailers during the pandemic. Two out of the four interviews stated that there is a huge emphasis on being able to seamlessly integrate instore experiences with customer’s omnichannel. The data collected showed that as retailers grow in digital maturity they enhance or create an app. This theme or digital trend was articulated by all participants. Advancements in ecommerce apps have become more efficient to implement and fit seamlessly in to business processes while enhancing the customer shopping experience and providing a digital solution for Covid-19 restrictions. These advanced software applications are seamless connecting with existing digital systems and merging with customer’s omnichannel devices. The data results discussed examples such as H&M customers can efficiently seek shopping assistance through the mobile app “check items stock levels with the QR codes on labels there the app. You can even check if they've got your size”.

The data results indepthly describe the integration of systems and how they have become more coherent with the 'barriers broken' between retailer’s online platform and social media. Retailers are immersing themselves onto the customer's omnichannel and seamless integrating with social platforms. This level of digital maturity is proven to reach the target audience and optimise sales. The broken barriers between platforms are shortening the online purchasing journey as one can navigate from social media directly to the item on the website. Buying an item of clothing directly from Instagram has been cited as an example of this, but there are more. Similarly, the secondary data findings underline that the “new omnichannel reality, the experiences of shopping online and shopping in physical stores are increasingly blurred” (WGSN, 2020). The data collected showed high-end brands have expedited this, an example being Prada’s ‘AR try-ons’ interactive experience which seamlessly integrates fashion retail instore, online and the Snapchat platform (see Appendix). Prada’s ‘AR try-ons’ is a key example of an 'extended enterprise' in digital maturity (Chaffey, 2019). All participants
perception underlines that most fast-fashion retailers are developing through the digital transformation stages. However, three of four interviews agree fast-fashion models are still in the early stages of implementing innovative digital technologies. This shows some similarities with Bertola’s (2018) perception luxury high-end brands are 'keen on experimenting with new technologies and are generally the first to do so.

3.4.3 Innovative digital transformation trends

With the rise of the fourth revolution, it is expected that online experiences will become more sensory enriched, with ‘virtual brandscapes’ scenarios (Stylus, 2021). The research results from the interviews highlighted gaming as one of the most significant digital transformations trending this year. Three of four interviewees highlighted how fashion brands are innovatively immersing themselves on virtual gaming platforms as a part of their digital transformation strategies. The data results showed that new virtual and augmented reality technology trends are emerging. Luxury brands are not only experimenting in this virtual space, it is starting to filtrate into high-street brands too. There is explosive growth here, fashions brands are immersing in the gaming omnichannel, exhibiting creative marketing strategies and collaborations. The secondary data findings which WGSN’s observation underlines is that gaming “will unlock new revenue streams and creative potential for brands across every industry now and into the decades ahead” (WGSN, 2021). For instance, the data results discussed how “H&M teamed up with the Taco Boca” game, this is an impactful innovative digital transformation trend. Many fashion brands are invading and expanding in new virtual spaces to optimise sales and capture customers attention. For the 'TacoLife x H&M’ collaboration, this has been a successful design marketing strategy, it utilised technology in the form of a popular kid's game to promote its children's gaming-inspired apparel. The concept was innovative, it optimised sales with the customer buying a physical garment and a virtual one for ‘their avatar in the game that could be wearing the same T-shirt as the kid is wearing in real life”. Another high-end brand gaming strategy discussed was Louis Vuitton’s collaboration with the ‘League of Legends’ together with the celebrity endorsement of Maisie Williams. In this scenario, the physical and augmented garments could only be purchase through the game, giving the customer a greater sense of exclusivity and the tactic created hype which attracted new audiences into the virtual channel. Other examples in the data results included Adidas collaboration with FIFA sports PlayStation game and Gucci’s collaboration with North Face and the Pokemon Go gaming app. From the results, fast-fashions brands are in the early digital stages of experimentation with virtual and augmented reality.
The data results showed ‘virtual experience is going to become more important and gamification is massive now’. This individual’s perception highlights the importance of creating more engaging, interactive experiences to enhance the customer online purchase. The participant highlighted Shein as the prime example of implementing the gamify trend and who are at an advanced level of digital transformation. The secondary data finding WGSN (2021) reports Shein as ‘The fast-fashion giant loved by Gen Z and is making waves in the e-commerce space, having created the most downloaded app in the US, ahead of Amazon”. Both data collections, emphasise how a business model like Shein can successfully operate solely on a virtual e-commerce platform. This low price fast-fashion model is built on flash sales, implemented via advanced algorithms. It relies heavily on creating trust and loyalty by encouraging customer to review products and elements of gamify. It has 'broken the barrier' seamless integrating social media and business IT platforms and is considered to be "the TikTok of e-commerce” (Participant B; WGSN 2020). As well as gamification, some other e-commerce innovative trends important in digital transformation are building an online community through social media and hosting online event experiences such as ‘virtual catwalk’. Previous research by Bertola's (2018) recognised virtual experiences as a considerable cost, time but the workload reduction has demonstrable efficiency and environmental advantages. The results from the interview also suggest that augmented reality is another important trend that has emerged. It was presented that fashion brands particularly high-end brands created augmented clothing in the form of individuals portrayed wearing designer labels in imagery and social media filters like Prada’s ‘AR try on’. The data results underlined that 'Fabricate sold an augmented dress for 9,500 dollars', as portrayed in chapter 1 fashion has strongly associated individuals with 'visual identify' or ‘status symbol’ (Berward, 2003). It may be a ‘status symbol’ but yet an extortionate price for something that one had only seen “virtually”.

3.4.4. Fashion retailer’s utilization of social media

A key theme that emerged was a huge emphasis on and the growing importance of social media marketing for fashion retailers; the interviewer posed the question. ‘how and in what ways have a fashion brand communicated to the digital customers?’ Social media was the dominant answer, followed by direct website/app, advertisements and email. All participants strongly agreed that Instagram and Tik Tok are the most impactful social platforms for fashion brands, as “it's geared towards fashion because it's a visual platform”. The findings from the interviews presented a strong insight into how fashion retailers are utilising social media. Retailers are
discovering new methods to incorporate social channels into the online shopping experience and some businesses can solely operate on the Instagram

A variety of marketing strategies were discussed from product promotions, influencers marketing, paid advertisements, content creation, social shopping, brand filters etc. Participants agree that social media content has become more rich and sophisticated. The use of Instagram Reels and Tik Tok video has intensified during the pandemic and fashion featuring in social media content is becoming more innovative, engaging. The data results showed that video content for promoting products are presented in more creative ways with shopping halls, clothing transitions, styling shoots, ways and places to wear, etc. As discuss in previous research and in the data findings innovative video content has the ability to transform a business if they reach of ‘going viral’ if the content is share worthy and engaging for users.

**Targeting Channels**

Three of the four interviews discuss that their companies have become more active across social platforms since the pandemic. Fashion retailers are now actively posting and creating multiple profiles to reach their target segments. The data results showed fashion retailers such as H&M use a strategy to target their audience by creating multiple profiles based on the category of product, e.g. men, women, kids etc.

**Social shopping**

All participants agreed that during the pandemic fashion retailers are optimising their social channels to obtain sales realising that this has the potential to renew or transform the business. In the secondary data findings, Instagram business (2019) reports ‘130 million users click on shopping post to learn more about products monthly’ and WGSN (2020) describes Instagram as a “digital mall”. The results from the interviews showed that social shopping has transformed, it is becoming more seamlessly integrated between the direct retailer’s website and social media. Participant B describes it as the ‘barriers are broken’ in the customers purchasing journey from social media to purchasing the product via a more efficient digital process and with the instant buy now button. Social media has become more efficient ‘fewer steps’ in the navigation of customers purchasing journey from social media. The secondary data finding from WGSN (2020) reports “brands and retailers are leveraging social media to create a more seamless, digitally immersive shopping experience”.

Influencer and Emotional marketing

From the interviews, the results show that fashion retailers utilise social media through influencers and emotional marketing. According to the WGSN (2021) during the pandemic, retailers are experimenting on social media platforms to replicate the in-store experience and positively interact with customers. Previous research Kim’s (2020) observation underlines that fashion brands create an emotional connection with customers by personifying the business on social media and interacting with them. All Participants agree the importance of influencers and how they are used to promote a product, there is a strong link between creating trust and emotional marketing. Influencers post daily stories of life creating an emotional connection with followers. Fashion brands tap in to this emotional connection by the use of influencers.

Virtual Reality

The results showed high-end brands are utilising virtual 'influencers' avatars now. Effectively personifying an avatar such as Michaela who has five million followers. In previous research Casini and Roccetti (2020) showed fashion brands are increasing utilisation of ‘personify’, the virtual YOOX avatar on Instagram to promote products. This concept avatar trend is innovative and evolving, with a large follower base. This type of virtual reality is becoming more influential with the emotional ‘personify’ connection used to promote fashion brands.

Brand filters

The data results showed fashion retailers are creating Brand filters on social media platforms. The idea is where Fashion retailers are creating filters that the user can purchase and allows the individual to give the illusion 'that they’re holding this Louis Vuitton or high-end product'. The augmented reality version of the product costs dramatically less and is more sustainable. ‘The advantage of using technology you’re not overproducing’ was quoted during an interview 'we're living online’. Previous research, Berward’s (2003), associates luxury fashion brands with a 'status symbol'. For superior brands the use of social media brand filters are an inexpensive and impactful way to market. Fashion retailers are adopting virtual reality experiences to market products in new engaging ways. The data result showed Prada AR try on integrating with Snapchat. The merge of social media and retail shopping to virtual interactive shopping, innovative digital gamify experience to shop.
3.5 Strength and Limitations of research

As this is a cross-sectional study with limited timeframe the topic is still under-explored, however, the research still achieves the primary aim of understanding the impact of COVID-19 on the fashion industry and how retailers have adapted to cater to an online audience through digital transformation. The primary data source is a small sample which only captures snapshots of concepts and cannot represent the entirety of the estimated 3474 Irish clothing retailers. However, the data finding is still significant as the information is collected from dominant players of fashion retailers in Ireland. The established themes discussed could be examined in more depth and other significant themes emerged in the data results but were eliminated, such as sustainability in fashion with the assistance of digital technology, how the pandemic impacted on customer online behaviour or changes in the underlying or core business IT systems. This was due to limitations on the research study which were primarily the allotted timeframe and word count. A weakness of the study is the accessibility to the population. Seeking voluntarily candidates with appropriate criteria and willing for participating in the study was the most challenging aspect. In addition, some were restrained from participating due to contractual obligations. However, the data collection gathered strengthens our understanding of the concept, as these participants who work in the head offices of leading fashion retailers shared their thoughts, firsthand experiences and interpretation of events as they worked through the pandemic.

The strength of the research is the exploratory approach, the study presents significate value in capturing a situation analysis of fashion retailer’s digital transformation. The qualitative data study is capable to giving a better understanding of the concept through the participant’s perception of the problem statement. This method has some limitations in that it is more difficult to have an exact measurement of the data result, because it is non-statistical and not numerical data.

3.6 Future Direction

From the data collection there is the study there is still potential to explore the theme to strengthen the key aims and objectives. It could be considered to also enhance the study in a mixed-method approach if there was a longitude timeframe. There has been no major issue
with the ethics or management of the research. However, the researcher suggests a longitude study, more sampling and extended word count would be preferred to explore this in the future.

The value of the study is in:

- the identification of innovative technology and trends that emerged during the pandemic and in most cases because of it
- understanding how things have changed in fashion retail, which changes are likely to be temporary or permanent
- understanding what the competition are doing in the digital transformation arena
- to assist when designing effective digital marketing strategies
- to assist when trying to decide what may be required for a business to reach the next level of digital maturity

Although this was achieved the pandemic is still ongoing, a longitude study could capture more rich data to help further in understanding the new normal future of fashion retailers.

3.7. Research Implications

The marketing study has a few implications for fashion retailers digital transformation. No matter what the size of your business but particularly for medium and large fashion retail players, it is highly recommended to implement an effective digital plan, strategy or transformation and accelerate towards more advanced stages of digital maturity. As highlighted, the fashion industry is a fiercely competitive market, the ‘threat of new entry’ barriers are low, the surplus of new players are assisted with eCommerce platforms (Chaffey, 2019, P203). Advancing in digital transformation strategies has become an effective way for fashion retailers to set themselves apart from the competition, reach a new or broader customer base and ‘survive’ the pandemic. Digital transformation is highly beneficial to fashion retailers to sustain the consumer needs and expectations and as a result to survive in the future ‘new normal’ fashion world. With constant lockdown without technology, the fashion industry would most likely have ground to a halt. It enables businesses to adapt to a changing world fast, to operate more effectively and optimise their processes or services through new innovative technology.
The research study exhibited a variety of significant innovative technology trends emerging within the fashion industry. The outcome of the results show fashion brands are expanding onto the omnichannel, immersing in virtual reality environments to reach customers and to create unique experiences. It is important to have awareness of digital strategies and understand the current situation of where fashion retail is at. This is why the significance of the study gained direct experiences of leading fashion retailers and researched contrasting literature and secondary sources in order to bring more depth to the study. Examination of this research study can help in designing an effective digital marketing strategy that is appropriate to the new normal of fashion retail. It is crucial for business survival, to keep up with the latest digital trends as there is serious competitive rivalry for the same target market.

A major outcome of the research is the advancement of seamless integration across online and offline channels. It is highly recommended for businesses to proceed in omnichannel expansion and merge the online channels as part of the instore experience. From the results, all participants mentioned there is a huge emphasis to seamless integrate in-store with online platforms. Instore app mode and social platform were frequently articulated themes. The situation analysis for fast-fashion retailers shows that it is becoming ‘essential’ or expected that retailers have a high-quality app, interactive elements and are actively communicating engaging content. As well as seeking innovative digital trends and the latest fashion products to stay ahead of the competition. It is advisable to concentrate on seamless navigation, merge of the online and physical store through a business intelligence app and provide rich engaging digital experiential content. The pandemic has practically forced fashion retailers to create these new and exciting online experiences. The future of fashion retail is only going to get more innovative as fashion brands advance further in their digital transformation and digital maturity.
Conclusion

The research study provides a deeper understanding of the pandemic on the fashion industry, while offering significant insight into how retailers have adapted to digital transformation methods. The pandemic is compared to a ‘catalyst’ that thus reshaped the fashion retail model while accelerating their digital transformation strategies (Li, 2021). COVID-19 has caused major financial suffering and disruptions throughout the global fashion industry. As well as this, the impact on supply chains has been detrimental to the sector. Therefore, in order for retailers to survive it is crucial that they act now to develop and enhance their digital maturity levels. A key finding from the research shows the extent to which fast-fashion is rapidly advancing in digital technology since the pandemic emerged. In a pre-COVID era, Bertola (2008) perceived luxury brands to be exclusively ‘keen’ on experimenting with new digital technologies, as opposed to fast-fashion retailers who were slower to adapt. This study shows that fast fashion retailers are in the initial stages of experimenting with digital transformations and innovative technologies, in the hope of somewhat bridging the gap between traditional high-street and high-end digital methodologies. Further findings specified that high-street stores such as H&M, Zara, and Adidas are increasing their creation of innovative marketing campaigns to mirror the success of these much-established haute couture brands and their digital strategies. In conclusion, many brands are successfully recognising the urgency to improve digital innovation strategies and pro-actively establish their digital footprints within the industry.

The research study also questioned how fashion retailers are reshaping their traditional business model. In previous literature, concerns were raised that the function of retail stores could potentially be evolving into ‘mere warehouse’ or ‘teaser platforms for the online’ (Casini and Roccetti’s 2020; Bertola’s 2008). Nevertheless, it is evident that solely integrated, e-commerce models such as ASOS, Amazon and Shein are now thriving due to their expediential growth during the pandemic. Previous investment in digital platforms meant that they were better equipped to operate with fewer disruptions to their businesses. This is in stark comparison to high-street retail models that struggled to survive without consumer footfall during the pandemic. However, the data results show that the participants disagree with Casini and Roccetti’s concept. The participants concluded that fashion and retail stores are seen to be ‘going nowhere’. They feel that the customer experience within retail is going to become more innovative both online and instores. The ‘new normal’ of fast-fashion retailers is evolving
through in-store digital experiences. In line with Bertola’s (2008) perceptions of ‘teaser’ platform stores, the data results envision that this concept is likely to translate in the future for the fast-fashion model too. It seems that shopping will expand to be more interactive or experiential in digital activities. Other concepts such as ‘wellness and sustainability’ sections were discussed. Participants agreed that these ideas were more likely to be incorporated into the consumer instore experience. The results showed that fashion brands may choose to downsize and instead create a more innovative digital experience within their flagship stores.

The key findings show how retailers catered for the online digital customer by prioritising the seamless integration of their retail omnichannel. The omnichannel is now being considered at all stages of the customer purchase journey - for full optimization, to maximise sales or target reach. It showed that fashion retailers are attempting to connect online and instore, using digital solutions for business processes, to create better customer shopping experiences. The data also highlighted that leading fast-fashion retailers are now advancing their digital transformation strategies with the development of e-commerce apps. These applications synchronize with physical stores for more efficient retail processes and thus enhance the digital consumer experience.

Research findings show that social media has become an essential tool for fashion retailers and has been heavily utilized since the pandemic. Retailers are recognising the significant value of social platforms and are now strategically advancing in this area. A variety of strategies has been implemented by fashion brands such as social shopping features, paid advertisement and influencer marketing etc. Since the pandemic, online video content has experienced significant growth. As discussed, fashion video content has become more creative with shopping hauls, ways to style and innovative clothing transitions at the forefront. Social media is recognized as the most impactful digital trend as it has the potential to go viral and transform a business. This study denotes that Instagram and Tik Tok are the key influential players among fashion retailers.

Clothing products and fashion advertisements are seamlessly immersed within customers online activity. Fast-fashion retailers now utilize a variety of innovative digital technologies such as virtual and augmented reality within emerging digital gaming platforms. Through digital marketing campaigns, fashion retailers are ‘blurring’ the line between e-commerce and gaming, creating ‘virtual brandscapes’ (Stylus 2021).
Evidently, the pandemic has caused huge hardship for the fashion industry. Businesses have been forced to adapt quickly in the new digital era. Those that can weather this storm and embrace digital transformation with success will not only survive, but will also gain a stronger market position. New innovations such as virtual catwalks and events, creative video content, virtual fitting rooms and online designer collaborations have emerged. The shopping experience has never been more exciting with these new interactive experiences. While fast-fashion retailers are only on the initial digital transformation stages of ‘optimisation’ and ‘extended enterprise’ it is clear that the future of fashion and the overall shopping experience is going to become more interactive and engaging (Chaffey, 2019). It will be intriguing to see just what the future holds for these exciting developments in innovation and technology within the fast-fashion industry.
Bibliography


Appendix
Appendix A

Participant Consent Form

Covid-19 and the dynamics of digital transformation: Reshaping the fashion industry

Consent to take part in research

• I……………………………………… voluntarily agree to participate in this research study.

• I understand that even if I agree to participate now, I can withdraw at any time or refuse to answer any question without any consequences of any kind.

• I understand that I can withdraw permission to use data from my interview within two weeks after the interview, in which the material will be deleted immediately or after the study.

• I have had the purpose and nature of the study explained to me in writing and I have had the opportunity to ask questions about the study.

• I understand that participation involves a recorded video/email interview a Q&A Session on the research topic (digital Transformation, Fashion industry/Retail the Covid-19 impact)

• I understand that I will not benefit directly from participating in this research.

• I agree to my interview being recorded in video or email interview.
  o video recorded (via Zoomcall)
  o Email

• I understand that all information I provide for this study will be treated confidentially.

• I understand that in any report on the results of this research my identity will remain anonymous. This will be done by changing my name (ie. Participant A) and disguising any details of my interview which may reveal my identity or the identity of people I speak about. The name of the company name I work for and job title will revealed.

• I understand that disguised extracts from my interview may be quoted in the Dissertation only. The published paper with only be used for academic purposes.
• I understand that if I inform the researcher that myself or someone else is at risk of harm they may have to report this to the relevant authorities - they will discuss this with me first but may be required to report with or without my permission.

• I understand that signed consent forms and original video recordings will be retained in the researcher possession on drive with password protect until the November 2022 for until the DBS exam board confirms the results of the dissertation.

• I understand that under freedom of information legalisation I am entitled to access the information I have provided at any time while it is in storage as specified above.

Dublin Business School
Master of Science Digital Marketing

Contact of the Researcher

Name: Niamh Mc Tiernan
Number: 086 XXXX XXXX

Signature of research participant

-----------------------------------------  ------------------
Signature of participant                  Date

Signature of researcher I believe the participant is giving informed consent to participate in this study

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Signature of researcher                  Date
Appendix B

**Interview Questions**

*Covid-19 and the dynamics of digital transformation: Reshaping the fashion industry*

**Intro**

**Demographic**

1. Tell me more about your background fashion experience?

**Impact of Covid-19**

2. How do you think the Covid-19 Pandemic impacted the fashion industry?

3. How did the pandemic effect fashion retail?

4. How has the customer behaviour changed during the pandemic? and why?

**Impact of Covid-19 Irish fashion market**

5. How has the Pandemic impacted the Irish fashion market?

6. How impact did the Pandemic on your company?
   - How did you company react to the pandemic and why?

**Digital Transformation/omnichannel**

7. To what extend has the following changed or been enhanced during the Pandemic? and why?
   - fashion shopping experience?
   - digital services?
   - channels? Is there a particular that has been really channel being used?
   - Fashion Marketing?

8. How has technologies has helped improve services/customer experience in fashion retail and why?

9. Have you noticed a new technologies or digital trends in the fashion shopping experience?
10. Which fashion retailer do you think has the best online presence/experiences and most advanced in digital services? Why?

11. What improvements or changes have you noticed in online shopping experience/websites in your company?

12. What improvements or changes have you noticed in online shopping experience/online presence/websites in competitors?

13. What are the positive effects using digital technologies within fashion retail?

14. Is there been any negative when using digital technologies within fashion retail?

Digital Transformation Trend
15. Which technology, digital trend or channel that is been most impactful during the pandemic?

16. Have you noticed any new or emerging fashion trends technologies for post-pandemic retail experience? If so yes and explain more

17. Where do you see fashion and retailing going in the future for the ‘new normal’?

18. Have you noticed any new fashion digital experiences/features on online?

19. How has fashion brands video content changed during the pandemic?

20. How and in what ways do fashion brands communicate with customers digitally?

Social Media
21. How are fashion brands using social media to promote their products?

22. Which social media platform is most impactful for fashion retail and why?

Virtual Reality
23. How are fashion brands using virtual reality/augment reality? or are they?

Optimised Digital Transformation
24. Which leading fashion retailer utilises digital transformation in the Irish market? and why?