

Changes in Retail Consumer Behaviour in South Africa during COVID-19: Permanent or Temporary

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ABSTRACT

The lockdown phases of the COVID-19 pandemic, with little or no mobility and only digital connection, has led to an understanding that sudden and universal policies of psycho-social intervention has transformed the dynamics of consumer behaviour and redefined social, economic, and individual orientations. The aim of this paper is to determine whether the transformation in consumer behaviour is for the long or short term. Our strategic approach was to review insights from research organisations and scholars that explain the volatility of the times and the shifts in consumer behaviour. The research organisations conducted empirical research globally and in South Africa, with regards to consumer sentiments in the pandemic. This paper recognised notable shifts in consumer behaviour such as a shift to value and essentials. The pandemic, economy and technology are drivers of the change. The rise of knowledgeable consumers has exposed retailers to improvisation, balancing demand and supply and leading to further digitisation of buying. The conclusion is that as time progresses consumers will move beyond survival, the use of e-commerce for shopping will increase as several digital platforms emerge and retailers will be more resilient to manage global crisis. The implication of the shift on management and retailers compelled us to recommend resilience and remodification of the business models used by retailers.

Keywords: Consumer sentiments, consumer behaviour, improvisation, technology, Coronavirus

INTRODUCTION

It has been more than a year already, and cases of the Coronavirus (COVID-19) have unequivocally increased in different parts of the world. The uncertainty of the COVID-19 pandemic looms globally; its impact is felt differently across many geographic zones. For this reason, consumers' response to the crisis and adaptation to the new normal differs (Murashkin & Tyrvalinen, 2020:7-9). Consumers' sentiment and behaviours across different countries are diverging (McKinsey, 2020). The psycho-social conventions of the COVID-19, i.e., lockdown, social distancing, wearing of masks and so on, have disrupted the consumer habits of shopping and buying. Consumers are now financially affected with a new twist and have considerations for healthcare, personal health, and wellness (Sheth, 2020:280). Consumers have learnt to improvise as new habits emerge. All these are primal to a new motivation for long-term behavioural change of consumers or the suggestion of a new segment of individuals who migrated to a new value of save to stockpile (Vijayan, 2021:1-2).

The study refers to surveys conducted by McKinsey (2020) across forty-five countries to understand the impact of COVID-19 on consumer sentiment and behaviours. It was documented that there is adjustment in the way consumers respond to the crisis and adapt to the new trend. While the COVID-19 pandemic persists globally, the impact is felt

differently in many countries. Therefore, the reflection of consumer behaviour to the COVID-19 crisis is uncertain from the economic point of view (McKinsey, 2020).

In South Africa, the survey conducted by McKinsey (2020) revealed that despite the ease in national restriction levels, consumers have mixed feelings and are uncertain about the economic recovery and outlook of the country. The financial impact of the pandemic has left consumers in diminution of income, spending and savings. Consumer preferences are not on discretionary spending. However, Arora, Charm, Grimmelt, Ortega, Robinson, Sexauer and Yamakawa (2020:4) are of the view that South Africans have adopted an aggressive saving habit. Many consumers have tried new shopping behaviour and they intend to continue even beyond the COVID-19 crisis (Arora et al 2020:4).

In South Africa, more consumers are concerned about the economic recovery of the country (Accenture, 2020). The Government Paper on the Economic Reconstruction and Recovery Plan in South Africa (South African Economic Reconstruction and Recovery Plan, 2020) attested to the fact that the outbreak of COVID-19 found a vulnerable economy in South Africa that has passed through two consecutive sessions of recession. More so, the pandemic only deepened the economic crisis and the impact in the retail sector is a fallout of the obvious. One such impact is the shift in consumer behaviour. Meanwhile, the question here is whether the shift in consumer behaviour is temporary or will subsist after the COVID-19 pandemic. Knowledge of the length of time will assist both the formal and informal retailers to know what strategy to formulate or adopt at what time. Therefore, the purpose of this study is to determine through the examination of the results of various research organisations whether the shifts in consumer behaviour are permanent or transient in the South African retail sector.

LITERATURE

Consumer behaviour is the study of individuals and organisations and how they select and utilise products and services (Walters, 1974:2). Consumer behaviour identifies continuous actions that involve the decision-making process of searching, purchasing, using, evaluating, and disposing of products and services (Valaskova & Kliestik, 2015:292). Three distinct approaches have been documented about consumer behaviour, namely psyche, sociological and economic approaches (Bray, 2008: 3). The psychical approach is based on the association between the psyche and behaviour of the consumer (Bray, 2008:4). Sociological approach is concerned with the reactions of consumers to diverse situations (Hoyer & Stokburger-Sauer, 2012). Economic approach is that which deals with the basic knowledge of micro-economy where consumers define their requirements (Mehta, Saxena & Purohit, 2020:291).

Engel, Kollat, and Blackwell, (1978:4) (EKB) model, had described consumer behaviour as the interrelationships between the stages in the decision process of external and internal variables, it clarifies the relationships between behaviour and attitudes and define variables with greater and functional relationships for empirical testings. Furthermore, the (EKB) model is affected by three broad factors namely: individual differences, environment, and psychological processes. The individual differences are consumer resources, knowledge, attitudes, motivation, personality, values, and lifestyle. The (EKB) model acknowledges time as the most important resource of the consumer (Engel, Kollat, & Blackwell, 1995:147). Therefore, the (EKB) is a tool for solving the problems that are time oriented and relates to consumer resources.

In the globalised world, consumer behaviour has been explained through the liberal pattern of defeating individual identity and embracing collective identity through brand culture (Szmigin & Piacentini, 2018:42-43). In South Africa, it is described as the mental and emotional processes and physical activities of people who engage in buying of products and services (Smidt & Maigurira, 2020). Consumer sentiment is an economic indicator that measures how optimistic consumers feel about their finances and the state of the economy. It measures the value of consumer confidence against the economy of the state. It considers the overall health of the economy through the opinion and feelings of the consumers (Sihvonen, 2019). Consumer behaviour scholars explained that people are heterogenous (not the same) and not all people have the same perception about situations with unfavourable effect like economic recession or pandemic (Amalia, Mihaela & Ionut, 2012:874). It was documented that the effect of recession on consumer attitudes and trends is critical. Some trends are advanced by recession or crisis and others are slowed and totally controlled (Flatters & Willmott, 2009:106). Restrictions in movement or gathering of consumers for shopping

has necessitated what is now referred to as adjustment in consumer behaviour. Despite the ease in the government policy on restriction levels in South Africa, consumers are unsure economically about what the outcome of the crisis will be. However, specific shifts have been noted in consumer behaviour and these shifts have affected consumers socially and may be present for a long time due to the pandemic. Therefore, managing the social/situational effect of the pandemic on consumer behaviour is imperative in this discussion.

Impact of COVID-19 on Consumer Behaviour

All consumer behaviour is influenced by time dependence and strong location (Sheth, 2020:2). More of the consumers engage in work activities between the hours of 8am and 5pm Mondays to Fridays, resulting in reduction of discretionary time. Furthermore, there is time shortage and time shift in both family and personal consumption time. Therefore, consumer habits are developed over time, what, where and when to consume (Sheth, 2020:5).

To reduce the effect of the pandemic on people in different locations, the government of South Africa introduced psycho-social measures such as lockdown, social distancing, wearing masks, sanitising of hands and so on. The containment of the pandemic has resulted in restrictions in movement, working, schooling, and shopping. Individuals now scramble for space at home to work, maintain privacy and convenience. Simultaneously, people have flexible time to work, attend school and shop. The result of the restriction is location constraints and shortage. Therefore, all consumption is time and location based (Abe, 2020).

Consumer behaviour over the years has become predictable because of the repetitive buying pattern of consumers, predictive models developed by scholars in the field of consumer behaviour and the development of consumer insights due to individual different levels of consumption (Krumme, Llorente, Cebrian, & Moro, 2013:2). Consumer behaviour is reflective of the relationship the individual retains in the form of habits. According to Sheth (2020), consumer behaviour is not only habitual but also contextual. Sheth identified four contexts that govern or disrupt consumer habits.

First is the social transformation context, which includes social changes by life events such as marriage, childbearing, geographic relocation, workplace, community, neighbourhood and so on. Second is the technological context - as new technologies emerge, old habits give way to new ones. Third is the consumption context which includes consumption of healthy and unhealthy products like alcohol, tobacco and firearms which are regulated consumption by location. Fourth is the less predictable context, including ad hoc events, natural disasters like earthquakes, hurricanes, and pandemics. All the backgrounds described are capable of disrupting consumer behaviour in the long run (Mehta, Saxena, & Purchit, 2020). Therefore, they drive the change in the consumption habits of consumers.

Sheth (2020) further documented eight factors that affect consumer behaviour amid COVID-19 as stated below:

Hoarding - alludes to consumers' excessive stocking of essential daily consumption products thereby resulting into temporary shortages and stock-outs. This was rampant with the health care products called personal protective equipment (PPE) for health care workers and supply chain of agri-food globally (Weersink, Von Massow, Bannon, Ifft, Maples, McEwan, McKendree, Nicholson, Novakovic, Rangarajan & Richards, 2021:1).

Improvisation - caused by scarcity of consumers' choice and the need to adopt another product to sustain a present consumption habit. Weddings and funeral services had to be conducted virtually instead of the traditional face-to-face interaction (Degli-Esposti, Mortara & Roberti, 2021:2).

Purchase Suspension Demand - where consumers' preferences during the pandemic demanded that certain products and services be held in abeyance until a convenient time in the future. Consumer goods affected here are automobiles, homes, and appliances. The discretionary services are concerts, sports, restaurants, and holidays (Ozili & Arun, 2020:1-5).

Digital technology - the restrictions on consumption forced consumers to adopt new technologies and their applications, for example social media like Facebook, WhatsApp, LinkedIn, YouTube, etc (Baig, Hall, Jenkins, Lamarre & McCarthy, 2020:4). The effect of technology and social media in general on consumer behaviour is massive.

Reverse Purchase - Due to the total lockdown globally in some countries like China, India, Italy and so on, instead of consumers going to stores, the stores came home to the consumer. This has broken the habits of physical representation in a brick-and-mortar store (Alanezi, Aljahdali, Alyousef, Alrashed, Mushcab, AlThani, Alghamedy, Alotaibi, Saadah & Alanzi, 2020:119).

Blurring of boundaries between work and home - Consumers are constrained to work at home as prisoners with limited space and diverse discrete activities (Sheth, 2020:8). Re-uniting with friends and families - Many have used the occasion of the pandemic to bridge gaps between friends and families. Many friends and families had to contact each other to assure one another of their state of health during the pandemic (Sheth, 2020:9).

Talent discovery - Having flexible time at home led consumers to discover talents in cooking, dressing and development of creative abilities (Sheth, 2020:10). All these factors contribute to the affect on the consumption pattern of consumers. Therefore, retail businesses that anticipate the changes in consumption patterns and act appropriately and timely are likely to reap the benefits.

Shifts in Consumer Behaviour

McKinsey (2016), in a pre-COVID-19 survey conducted to understand consumers' feelings about their financial prospects and the influence of sentiments on their buying behaviour, revealed a set of shifts among consumers in South Africa. South African consumer shift is a microcosm of the global interplay. Regarding shifts in the South African consumer sentiment, a reduction in consumer spending to save money and increase in the preference of favourite brands were observed (Coibon, Gorodnichenko, & Weber, 2020:2). Furthermore, it was reported that consumers traded down, i.e., bought cheaper brands or privately labelled products over their preferred brands (Knowles, Ettenson, Lynch & Dollen, 2020:2). However, consumers shifted toward modern retailers and away from independent or informal retailers (Aday & Aday, 2020:167). The implications of the shifts above were that the perception of value for money was a major influence on the South African consumer and that consumers seeking to save money were given the opportunity of free choice of their products or stores over alternatives.

Also, investments in revenue-growth management (RGM) which is the use of data and analysis to answer critical questions that channels pose to retail companies is altered. More so, channel strategies need be thought through especially where the informal retailers are involved. Due to the selective consumer trade-downs and trade-ups, retail companies were advised to develop a low-priced offering for down traders and a premium offering for high trade-up consumers. Therefore, retailers were to deliver exactly what the consumers want (Sheth, 2020:6).

McKinsey (2020) observed the following shift in consumer sentiment in the South African retail sector namely: That there has been a considerable shift to value and essentials, that is, consumers do more discretionary spending. Also, there has been a migration to digital and omnichannel, meaning that consumers have opted to spend online, which may continue even after the COVID-19 pandemic. Meanwhile, most consumers have changed stores, brands and shopping patterns which speaks to a movement from perceived loyalty. Many consumers are not willing to resume normal life as it were; rather they are willing to work from home. The last shift is that consumers want to go on holiday, but at reduced cost and spending (Arora, Charm, Grimmelt, Ortega, Robinson, Sexauer & Yamakawa, 2020:16).

Accenture (2020), in a survey conducted in the United States of America on the first three trends above, revealed that huge corporate liquidity and revenue streams will shift across the sector, creating losses for many retailers but opportunities for those who best anticipate the impacts of the changes in consumer behaviour.

In a report KPMG (2020a) expressed that because of the pandemic consumers demonstrate elastic economic behaviour when it comes to spending as shown in previous epidemics where consumers' attention was on price, origin of the products and utility-based consumption. Just as in previous outbreaks like SARS, MERS and other natural disasters, consumers displayed elastic economic behaviour by way of steady, slow, or rapid recovery of market. The implication of this behaviour is that a part of it is permanent and changes structurally the way we work, live, and make buying decisions (Mehta, et al 2020:229).

The Accenture consumer research (2020) reported that due to the COVID-19 pandemic, a rise in the concern of consumers has led to change in consumer priorities which now centre on the most basic needs like hygiene and staple products, while non-essential products like clothing decline. A Boston Consulting Group report (2020) revealed that there was a substantial decrease in sales in different sectors, apart from change in spending patterns. Therefore, product support, patronage, and desire to shop by consumers depend on what the consumer considers to be sustainable options.

Expected Temporary or Permanent Changes

In comparison to consumers elsewhere in the world, South African consumers have been viewed as pessimistic in relation to emerging markets. A survey conducted in South Africa by McKinsey (2020) revealed that 20% of consumers are optimistic that the economy will rebound within two to three months and grow stronger than pre-COVID-19, however 51% of consumers are uncertain of the length of time that the economy will be affected by COVID-19. Growth can only be forecasted after 6 to 12 months. Within the next year (2022), consumers in South Africa will continue to witness reductions in revenue, expenditure, and savings. On digital and omnichannel, the expectation is that consumers will significantly increase patronage across categories during and after the COVID-19 pandemic. The trade-down behaviour of consumers has grown across all socio-economic classes and it is expected to reduce over considerable time.

Mehta et al. (2020) noted that as time progresses consumers will move beyond the mode of survival. Some of the shifts in spending behaviour earlier mentioned will not be retained however some may be permanent, as the research organisations have reported. The shifts from values to essentials and consumer change of brands may be temporary. While migration of consumers to digital and omnichannel and desire to go on holiday may be permanent. The expectation is that there will be greater use of e-commerce for shopping as different digital platforms emerge as touch points. For example, social media, mobile platforms, and official sites of products have been engaged by consumers during COVID-19 as they have turned to the digitisation in buying. The digitisation in consumer buying is expected to increase. Technology platforms are deemed to play a strong role in creating awareness, retention of consumers and reaching consumers after COVID-19 (Deloitte, 2020). This reflects in the form of Apps that attract the attention of consumers in relation to entertainment, healthcare, news, education, and awareness (Accenture, 2020).

On sustainability of consumer habits, Sheth (2020:280-283) offers an interesting account of the subject from the habitual point of view. It is difficult for old habits to die, though some habits will be inevitably subsumed by the lockdown conditions, provided alternatives that are more convenient for the consumers are discovered. Consumers pick up new habits or modify old ones. Old habits are modified through compliance with regulations and guidelines such as wearing of masks, keeping social distance, maintaining health regulations when shopping and so on. New habits generated are subject to three conditions, namely public policy, technology and changing demographics (Sheth & Sisodia, 1999:1). At the convenience of families, collective consumption has given way to individual consumption.

Implications of the COVID-19 Impact on Consumer Behaviour

It is important to consider the managerial, retail and research repercussions of the pandemic on consumer behaviour. These implications are strategic pointers to the future of consumer behaviour.

Implications on Management

From the management perspective, insights to be considered are that both consumers and businesses have learnt to cobble together (improvise) due to the pandemic. More of the large retailers like Walmart and Target are transitioning to cloud computing and this is facilitating the improvisation (Sheth, 2020). The physical stores are being

converged with online shopping and increasing capacity for omnichannel delivery. Retail businesses have learnt to make their infrastructures, processes, and systems more resilient to manage global crises such as COVID-19. Despite the strategy of improvisation consumer attitude may change as time passes, this implies that management must be ready to cope with the difficulties of online shopping e.g., difficulties associated with time factor, risks in online shopping etc.

Another issue that the management need to consider is the balancing of demand and supply. From supermarkets to hyper stores, retailers had serious shortages in supply chain, logistics and warehousing operations during the pandemic due to hoarding mentality of consumers. This implies that the management must avoid overstocking and understocking by way of understanding consumer demand, invest in consumer demand/supply planners, analyse target stock level, and optimize order and replenishment frequency (Eksoz, 2020). It is expedient to increasingly encourage online procurement as opposed to keeping merchandise waiting at the store for consumers. It is important for retail businesses to find ways to constantly improve on online experiences for consumers. Therefore, instead of the consumer going to the store, the store goes to the consumer at relatively the same price.

Consumers are likely to return to old habits if the technology they learn to use fails to offer significant changes in their lives. Strategic view of businesses will be on customers' experience and post-purchase services or support. The implication of the insights above is that retailers who adopted these strategies are making profit despite the disruptions by the pandemic, and the laggards are struggling.

Implications on Retailers

The rise of knowledgeable consumers along with the proliferation of products and niche markets mount pressure on traditional retailing. The retail efforts that go into the functions of inspiring, informing, and supplying are now heightened. An Ipsos (2013) survey gave preference to the internet as the primary source of information on new products and brand discovery for millennials (those aged between 18 and 34). Then it was predicted that millennials are more likely to trust in corporate responsibility than to put their trust in brands.

Today, these millennials drive and dictate consumer sentiments. Instagram is used by younger consumers to share daily clothing trends with others, collecting likes and inspiring each other. Brand messages are being changed through reviews, research and cocreation among technology-oriented consumers. It is expedient that the retailers should find out the platforms these millennials spend their time. Know what the consumers are doing on each platform. Be informed about the social platforms they prefer. Consumers who are connected to these resources and communities are actively involved. Consumer sentiment in the COVID-19 suggested that the crisis serves as reset opportunity for retailers in the footwear, clothing, and luxury sectors to strengthen their commitment to sustainability (Granskog, Lee, Magnus & Sawers, 2020). This implies that retailers must direct strategic efforts towards the millennial and technologically engage in innovative ideas of winning their buying decisions.

Before now traditional retailing business was conducted on a face-to-face basis only, consumers had access to goods displayed in the shops. Because of conventions introduced by governments globally to contain the spread of the COVID-19 pandemic, consumers are relying on online orders and deliveries for their purchases. Retailers who rely on high fixed cost structures, which compete by using inventories at hand, are increasingly losing out to competitors with lower fixed cost structures and extensive product assortment (Sheth, 2020). The discount retail business model that was designed by Porter (1985:168) has become obsolete. Business models that are rooted and designed to feed brick and mortar retailing have fallen short of strategies (Brea-Solis, Casadesus-Masanell & Grifell- Tatje, 2015: 13). Sorescu, Frambach, Singh, Rangaswamy and Bridges (2011:4) suggested a remodification of business models in retailing. The shift in consumer behaviour calls for new business models that will accommodate the present retail transformation. For example, Amazon operates at 15% price mark-up, compared to an average retail mark-up of 65% to 80% for appeal-centric retailers (Amazon, 2021).

Implications on Research

Lockdown, social distancing and wearing of masks have disrupted the pattern of consumer behaviour. The disruption gave room for new research to spring up ranging from problem recognition to search for information on shopping to delivery and waste disposal. Empirical research is being generated with some theoretical propositions on hoarding, blurring the work-life boundaries and the use of social media in a crisis. All these aims to enrich the discipline of consumer behaviour.

There is therefore an imperative need for academic research studies that focus on consumer resilience and improvisation, for example cultural differences exist in improvisation across the globe (Hallam & Ingold, 2021:5). There is the need for insight into the different techniques utilised by consumers globally to isolate themselves from the COVID-19 infection.

The use of social media has increased through Facebook, Instagram, WhatsApp, Twitter and Zoom (Chauhan, & Shah, 2020). The quantity of data being generated in word communication is enormous. The current analysis of video conversations is not useful, therefore, there is the huge need to develop different techniques of analysing video conversations.

CONCLUSION

The application of psycho-social convention policies of COVID-19 has led to significant disruptions to consumer sentiments and behaviour. All consumptions are influenced by strong aspects of geographic location and time-dependence. With flexible time but fixed locations consumers have learnt to creatively improvise. Whether the change in consumer behaviour will last or not depends on the national recovery rate of the economy. The view of research organisations is that the use of e-commerce will increase for shopping (digitisation in buying). Consumers that are not satisfied with their present choice will go back to their old habits. Retailers must position themselves to respond promptly and adequately to the needs of consumers. Technology is a major driver of the transformation in consumer behaviour, therefore, that which is artificial has become real to us.

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