Journal of Education, Society and Behavioural Science

34(11): 56-71, 2021; Article no.JESBS.73639
ISSN: 2456-981X
(Past name: British Journal of Education, Society & Behavioural Science,
Past ISSN: 2278-0998)

Retail Format Usage: Pre-COVID-19 Benchmark Data, Pandemic Practice, and Emergent Influence

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Authors' contributions

This work was carried out in collaboration among all authors. All authors read and approved the final manuscript.

Article Information

DOI: 10.9734/JESBS/2021/v34i1130367
Editor(s):
(1) Dr. Chih-Wei Pai, Taipei Medical University, Taiwan.
(2) Prof. Redhwan Ahmed Mohammed Al-Naggar, Management and Science and University, Malaysia.
Reviewers:
(1) P. Edi Sumantri, Wijaya Kusuma University Purwokerto, Indonesia.
(2) Arokodare, Michael Abiodun, Babcock University, Nigeria.
(3) Vijayaraj Radha, Amet University, India.
Complete Peer review History: https://www.sdiarticle4.com/review-history/73639

Original Research Article

Received 11 September 2021
Accepted 12 October 2021
Published 18 October 2021

ABSTRACT

Background: COVID-19 brought revolutionary change in consumer retail format behavior. Pre-pandemic, multiple retail formats were available, and consumers showed evidence of preference for particular formats. Then, the disruptions caused by store closures and stay-at-home mandates altered consumer behavior substantially.
Aims of the Study: The purpose of this work is to report the results of research on consumer preferences for retail formats as a benchmark for examination of changes in consumer usage of retail formats wrought by COVID-19 and projection of emergent post-pandemic behaviors. Pre-COVID-19, variety in retail formats proliferated.
Methodology Employed: Survey methodology captured preferences, practices, and recommendations related to use of retail formats. Research questions included: a) Which retail formats do consumers prefer? b) Which digital tools do consumers use to make purchases? c) Does delivery mode and/or product type influence retail format preference? d) Does retail format influence impulse purchasing behavior? e) Do consumers mix retail formats when making product purchases? and f) What will be the implications of COVID-19 for retail format preference?

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Results: Consumers reported differences in preferences for online, in-store, catalogue, and phone retail formats. Product type influenced consumer retail format preferences. Retail format influenced impulse purchase behaviors. Consumers used smart phones, laptops, desktops, tablets, email, discussion boards, social media, and social networks as purchasing tools.
Conclusions: This study investigated pre-pandemic consumer preferences and usage variables related to retail format. It provides benchmarks for examination of changes resultant from the massive retail disruptions of mandatory store closures and stay-at-home mandates. It further provides a framework for projections of emergent, post-pandemic behaviors.
Recommendations: The authors recommend further investigation of consumer retail format use during and subsequent to the height of the pandemic. Comparison of consumer usage pre- and post-pandemic can provide valuable input to retail planning.

Keywords: Retail; retail format; online retail; omnichannel retail; stores; consumer behavior; COVID-19.

1. INTRODUCTION

History can be a wise teacher. COVID-19 mandated massive changes in consumer behavior. Once the global pandemic was proclaimed, countries, states, and municipalities issued stay-at-home orders and closure of "non-essential" businesses in attempts to curtail viral spread. Retail was at the forefront in mustering the resources to meet consumer demand for groceries, cleaning supplies, and other essential products. At the same time, retail also experienced the crushing blow of store closures, especially in fashion product categories.

While retail is in a constant state of change and evolution, COVID-19 brought radical, revolutionary change. Disruption of the norm is especially evident in consumer use of retail formats. Pre-pandemic, multiple retail formats were available to consumers and consumers showed evidence of preference for particular formats. Then, the disruptions caused by store closures and stay-at-home mandates altered consumer behavior substantially.

The purpose of this work is to report the results of research on pre-pandemic consumer preferences for retail formats as a benchmark for examination of changes in consumer usage of retail formats wrought by COVID-19 and projection of emergent post-pandemic behaviors. The research questions that serve as guides include:

1. Which retail formats do consumers prefer?
2. Which digital tools do consumers use to make purchases?
3. Does delivery mode and/or product type influence retail format preference?
4. Does retail format influence impulse purchasing behavior?
5. Do consumers mix retail formats when making product purchases?
6. What will be the implications of COVID-19 for retail format preference?

1.1 Background

1.1.1 Pre-pandemic consumer usage of retail formats

While online, in-store, catalogue, and phone retail formats have been available to consumers, most of the discussion of consumer preferences and usage has focused on the balance of consumption online versus in-store in recent years. Pre-pandemic, consumer utilization of online formats gradually inched upward. By 2018, Radial [1] reported that the number of Americans and Canadians who reported purchasing at least $100 of goods per month online was about 57% [2]. By the close of 2018 e-commerce sales were 11 % of total consumer product gross sales [2]. For 2019, e-commerce channels were evolving and growing with consumers increasingly comfortable with online purchasing [2]; 57% placed 10 or more online purchases in the past 12 months [3]; click-and-collect forms were seen by nearly 50% of consumers polled as providing the convenience of online shopping without shipping fees [2]; free shipping drove online channel selections for nearly 70% of consumers [2]; and 61% used order online with in-store pickup in the past 12 months [3].

Pre-pandemic, omnichannel retailing emerged as an imperative strategy for retailers in reaction to consumer preferences [3,4,5,6,7]. Thirty-eight percent of consumers reported that they would shop an online brand more frequently if it also had physical stores [3]. A report published by the U.S. Chamber of Commerce [8] highlighted the redefinition of store experiences to woo today's ever-connected shopper. These shifting roles for stores included innovations such as co-creation studios for consumers and interactive merchandising [8]. Similarly, Bloomberg Business [9] reported that while surprising to some marketers, young consumers love shopping malls. Ninety-five percent visited a shopping mall in a three-month period, integrating their store experiences with social media and their phones. Technology empowers consumers and influences their format choice by enabling them to make more informed decisions, receive more targeted offers, and obtain faster service [10- 13].

During this same period, leading up to the pandemic, consumers showed dwindling interest in phone and catalog sales. In 2019, H&M stopped printing its catalog, stating that buying online has made printed catalogs largely obsolete [14]. This followed the termination of the Victoria Secret catalog in 2016 [14].

By the end of 2019, reports on strategies that would shape the retail landscape in 2020 reported that technology had permanently shifted the ways consumers discover and engage with brands [15]. Then, the key takeaway from the National Retail Federation's Big Show in January 2020, was the comeback of the brick-and-mortar store [16], not by returning to 20th century business methods, but by creating compelling spaces, providing good customer service, using analytics to measure in-store activity, and calculating that all sales may not be made in-store, even when initiated there [16].

Indeed, amid the incremental growth of online formats and news reports of the demise of physical brick-and-mortar stores, retail showed promise, especially for fashion goods [17]. In fact, the National Retail Federation reported [18] that for every retail store that closed, five new stores opened. Hence, by the time the spread of the COVID-19 virus forced declaration of a global pandemic, online retail, while growing, still represented only about 10 percent of consumer purchases [18]. The remaining nearly 90% of purchases occurred in-store.

Impulse buying is an additional feature of consumer choice related to this study since it relates to one of the research questions. Pre-pandemic research indicates that both internal and external factors have significant behavioral influences on impulse buying, including age, marital status, income, shopping enjoyment, and promotional approach, with income and shopping enjoyment being most influential [19]. One study attributed about 40% of all online consumer expenditures to online impulse buying, arguing that online shopping is more conducive to impulse buying than its off-line counterpart [20].

1.1.2 Consumer usage of retail formats during the covid-19 pandemic: dramatic shift to online

At the onslaught of the pandemic, consumers experienced panic and product availability anxieties. Grocers tackled mammoth surges in sales and inventory depletions. As businesses deemed "non-essential", including fashion retailers, were forced to close, online shopping, including delivery and store pickup, became the new reality. Online sales at full-assortment grocers increased between double (Erlichman, 2020, March 26) to 10 or 20 times for March 2020 over previous periods [21]. One report showed a 325% increase in mid-March (Melton, 2020). Such changes in consumer use of retail format, from physical to online, represent huge dollar volume shifts (Erlichman, 2020, March 26). More generally across product categories, while before the pandemic only about 10% [18] or 11% (Erlichman, 2020, March 26) of total retail sales were transacted online, immediately online retail experienced a surge. Early figures for Amazon showed a 65% online increase [22], Costco 48.9% [23], and Target 50% [24]. While a substantial portion of online increases were in groceries, mass marketers, such as Walmart, Target, and Amazon also sold fashion goods.

In contrast, initially, brick-and-mortar retailers saw foot traffic dwindle to a trickle and then stop all together as consumers were mandated by governments to stay at home. For physical stores in the non-essential categories, store closures were devastating. Physical retail screeched to a halt. Yet, employees, leases, and outstanding invoices remained to be paid. COVID-19 had initiated a revolution in retail format. Consumers lost a formidable portion of physical retail and were sanctioned from going to stores, except for necessities. In an initial two-week period, 50,000 retail locations closed [25], followed ultimately by 200,000 closures by the end of March [26]. Stock prices dropped for major retailers Macy's, Kohl's, Nordstrom Inc., and Gap Inc. by 60 -70 percent [25].

In this dynamic environment, consumer behavior had shifted [27]. For example, nine of ten consumers changed their shopping habits, more than 50% of consumers ordered a product or products online that they would normally have purchased in-store, nearly half of consumers stocked up on essential items, and 60% expressed worry about going to a physical store [27].

1.1.3 Projections of post-pandemic use of retail formats

1.1.3.1 In-store retail

Mathew Shay, National Retail Federation President, referred to retail as a resilient industry that will lead the U.S. economic recovery as the pandemic crisis recedes [28]. Indeed, in addition to robust online sales, as physical stores began to re-open, shoppers surprised retailers by their stronger than anticipated return to stores [29]. For example, in the first weeks of re-opening, Burlington Stores had sales ahead of last year. American Eagle Outfitters reported sales at 95% of the prior year, Abercrombie & Fitch at 80%, Gap Inc. at 70%, and Kohl's at 75% [29]. By the third week of June 2020, sales are averaging about 95% of their normal levels [29].

Tabulated sales data also show, however, a bifurcation in performance with department stores underperforming other nonfood sectors [29]. Dire projections suggest that more than 50% of department stores in malls will shutter by the end of 2021 [30]. Vince Tibone, a senior retail analyst, suggests that much of the disruption in retail anticipated in the next five to ten years will accelerate to the next two years [31]. Recent bankruptcy filings by Neiman Marcus Group Inc., J. Crew Group Inc., Stage Stores Inc., True Religion, J.C. Penney Co., and Macy's substantiate this alarm [32].

Yet, consumer preference will remain strong for shopping in-store since 70% of shoppers still prefer to visit brick-and-mortar stores [33]. While prior to the pandemic, online purchases accounted for only about 10% of sales [18], even with the pandemic surge to online, it is anticipated that in-store sales will still account for about 75% of total retail volume.

1.1.3.2 Online and omnichannel retail

Online and ominchannel (hybrid) retail formats saw tremendous growth from the pandemic and are projected to increase [34,35,36,37,38,28,39]. Pandemic-induced shopping behaviors will likely be retained [39]. Now that consumers have made the leap to online shopping, it is unlikely that they will revert to their old ways entirely [39]. New retail habits are now ingrained [40] and retail has changed forever [37].

Innovation will play a major role in post-pandemic retail formats. This includes applications that use Artificial Intelligence (AI) [41,38,42], transaction strategies [43], and experiential retail [44, 45] Ulta Beauty Management Discusses Its Covid-19 Experience and Expectations for the Post-Crisis Reality,[46]. Health and safety will be the focus of much innovation [47,48]. This will include appointment-based retail [49, 50, 51], curbside pickup [50, 52, 53], delivery services [50,53], and use of ultraviolet light [51]. The need to minimize the handling of retail items will make changes to the way people try and exchange goods [49]. Virtual try-on experiences will be more prevalent [54, 55, 35, 51]. Touchless retail will influence not only point of purchase behaviors, but also may lead to "showroom" experiences where consumers see a curated selection of goods rather than rummage through racks [49].

1.2 Mail, Phone, and Impulse Variables

While included less in discussions of future projections for retail, even mail and phone-based services will play some role in future retail formats [50]. "Shoppable Television" [56] is being explored by Amazon. Impulse buying, while not physically available during in-store retail closures [34], saw online growth of 18% [31].

1.3 A New Normal

Confusion exists among consumers about what "normal" will look like in the future and how soon it will arrive [57]. Fifty-one percent of shoppers expect life to return to normal in less than six months, yet more than 29% believe it will take more than a year. Millennials (65%) and Southerners (54%) are the most optimistic about life returning to normal in less than six months [57].

2. METHODS

This benchmark data study used survey methodology to elicit responses from 222 university students. The students were enrolled at the University of Houston in Houston, Texas. The survey interface of the online learning platform Blackboard was used to administer an investigator-designed questionnaire. Online administration of the survey was selected because the online format was familiar to the student population. Each student was enrolled in one of seven different courses at a large U.S. research university. The seven sections included face-to-face (4), online (2), and hybrid (1) delivery formats. The content fields of the selected courses focused on information and data management (4), visual merchandising (1), research methodology (1), and project management (1). One course was sophomore level, two were junior level, three were senior level, and one was a graduate course.

Data collection was via a questionnaire that contained three primary categories of items. First, both standard demographic items and background items specifically designed to explore digital usage and experience formed the initial section. General demographic items included participants' class level, gender, age, employment status, and enrollment full-time or part-time. Secondly, items designed to assess digital usage and experience in the arena of education were included. These items were directed at the number of online courses completed, computer use in the workplace, digital device use outside of employment, and social media use.

The third questionnaire category contained sematic differential type items that explored retail format preferences (online, in-store, mail, and phone), delivery and pick up preferences, the influence of product type, the influence of retail format on impulse buying, use of mixed retail formats, and digital tool usage.

Completion of the survey was voluntary. Subjects were assured anonymity of responses and that anonymity would be maintained in any publication of the results. Responses were downloaded for analysis with each response recorded by a non-identifying number. Responses to the survey items described were tabulated. Descriptive statistical methods including frequency analysis were used to analyze the data. Tables, graphs, and figures were used to analyze and exhibit the data.

Collection of information regarding consumer use of retail formats during the pandemic and projections of use after the pandemic were gathered for review from the popular and business press, including professional news services, journals, newspapers, and industry podcasts and websites.

3. RESULTS

3.1 Demographics and Digital Use

Participating consumers (N=222) were young with 70% of respondents 25 years of age or less. A majority (58%) were male. Eighty-nine percent were classified as at least a junior in college, and they were experienced with digital class presentation in that 45% of them had completed at least six online courses, with only 2% having never completed an online course.

Most of the survey participants were employed either full-time (27%) or part-time (42%). A majority (57%) reported using a computer at work as opposed to no computer use at work (27% were not employed). When the not employed participants were removed from consideration, the percentage of working participants who used a computer at work increased to 78%. Thus, it can be concluded that the majority of participants were computer literate.

Respondents also showed high levels of computer and digital device use outside of work with only 1% indicating that, in the context of outside of work, they used such devices less than one hour per day and 80% indicating that they used such devices four or more hours per day. Respondents' use of social media and networking technologies similarly reflected strong digital media use habits. Ninety-seven percent reported using a digital or networking technology such as Facebook, Twitter, or YouTube each day; 50% reported a use of six or more times a day. Consumers used smart phones (90%), laptops (95%), desktops (65%), tablets (64%), email (70%), discussion boards (42%), social media (61%) and social networks (61%) as purchasing tools for online or in-store shopping.

3.2 Retail Format Preferences, Influences, and Usage

When prompted to indicate their comparative preferences for specific retail formats, the mostly young consumers reported strong preferences for some formats over others. These included in-store* vs. mailed catalog (see Fig. 1), in-store* vs. phone (see Fig. 2), online* vs mailed catalog (Fig. 3), and online* vs. phone (Fig. 4).

However, consumer preferences were nearly balanced for the purchase of products online vs. in-store (Fig. 5) and mailed catalog vs. phone (Fig. 6). Hence, while participants in this study showed strong preferences for in-store and online formats over mailed catalogs and phone, they did not indicate strong preferences for either online over in-store or vice versa.

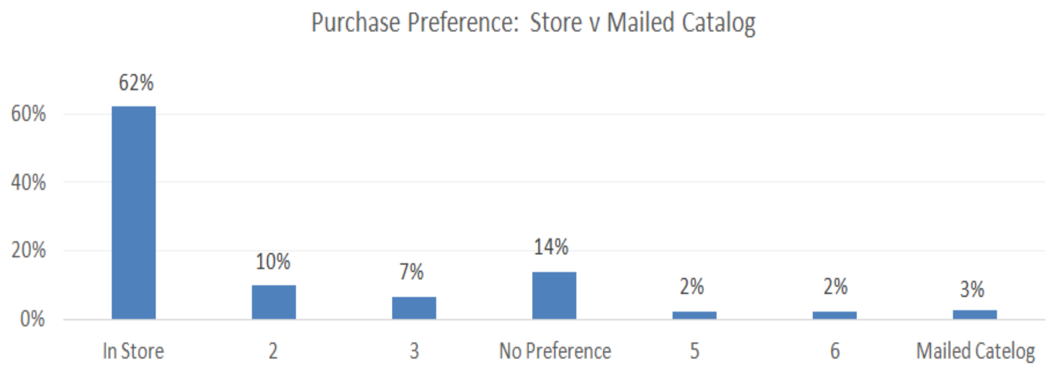

Fig. 1. Purchasing preferences in-store vs. mailed catalog
N=222

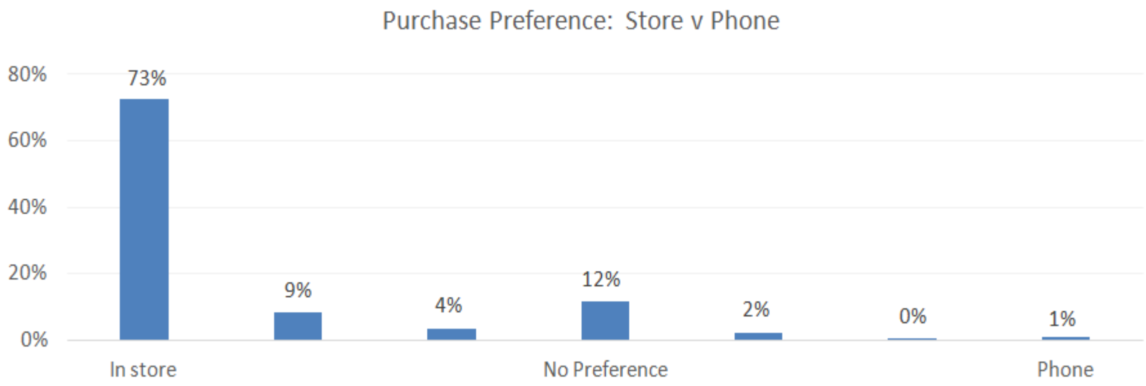

Fig. 2. Purchasing Preferences In-Store vs. Phone
N=222

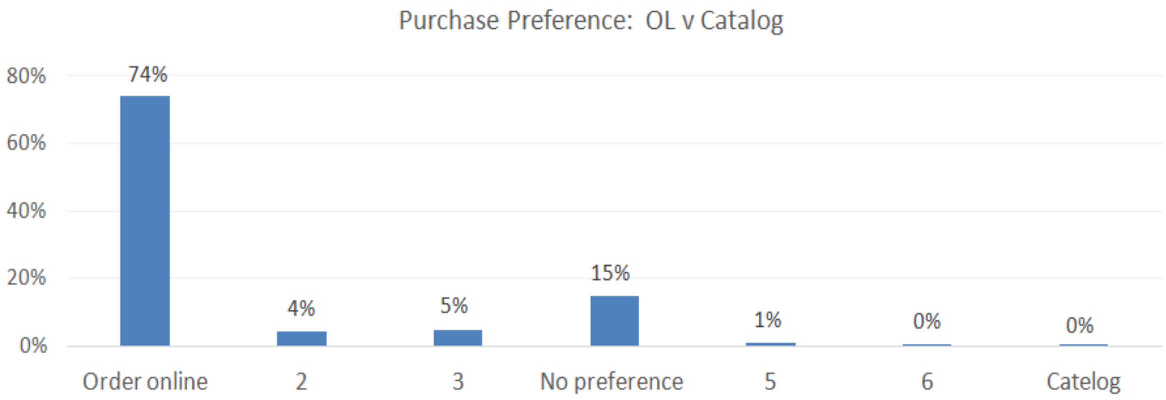

Fig. 3. Purchasing preferences online vs. mailed catalog
N=222; Note: For all figures and tables, use of standard rounding practices may result in percent totals of slightly more (101%) or less (99%) than 100.

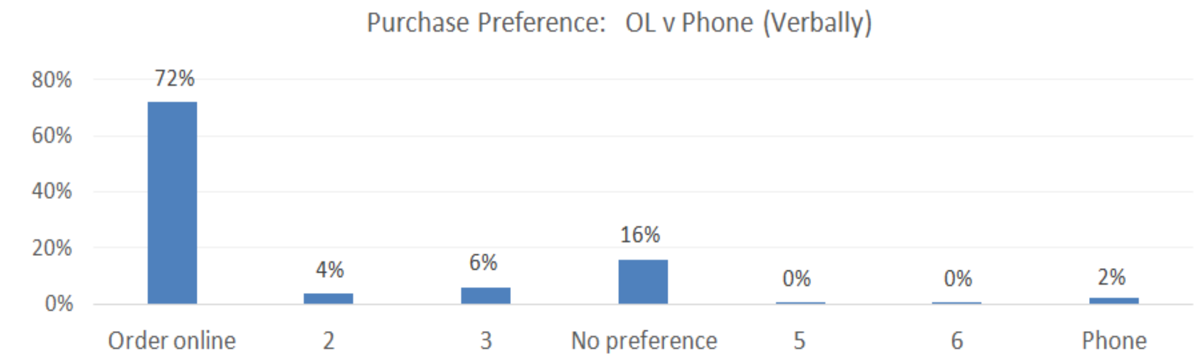

Fig. 4. Purchasing preferences online vs. phone
N=222

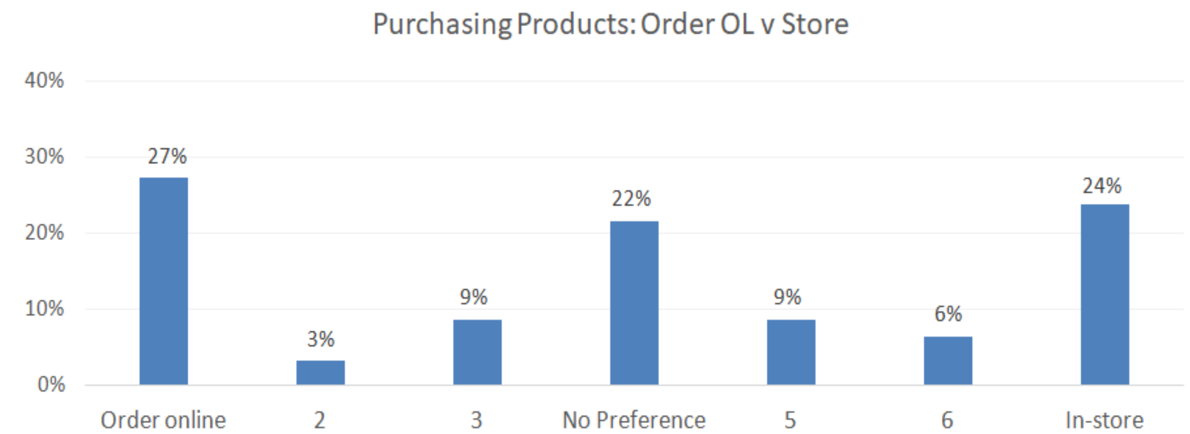

Fig. 5. Purchasing Preferences Online vs. In-Store
N=222

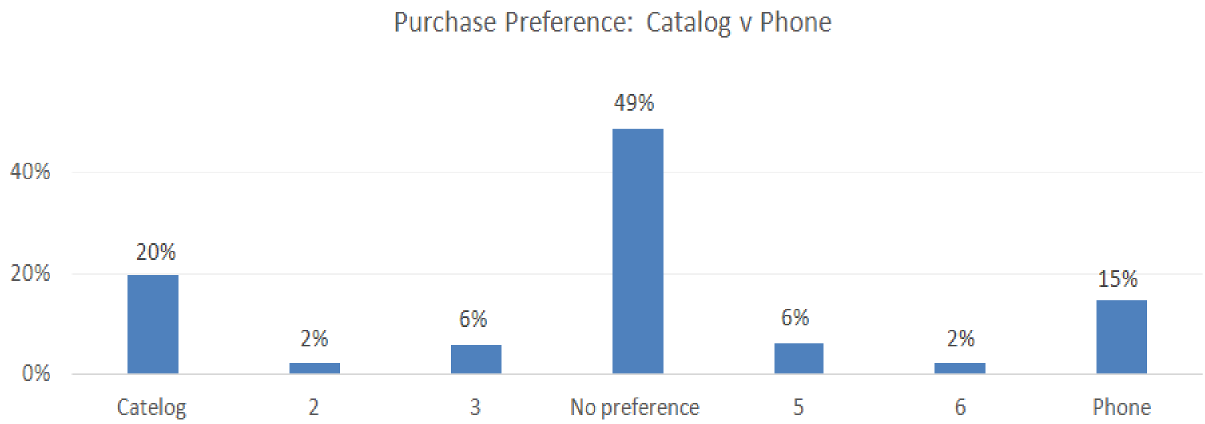

Fig. 6. Purchasing preferences mailed catalog vs. phone
N=222

To further explore preferences for in-store vs. online retail formats, the investigators asked whether the product type influenced purchase choice and found that for a majority of these consumers, product type did influence retail format choice. Further, for 23% of the consumers, product type was always an influence (see Fig. 7).

Additional inquiry was designed to explore consumers' preferences regarding using mixed retail formats. Preferences related to home delivery versus store pick up, considering the influence of cost, indicated that consumers had a moderate preference for shopping in a -store and a preference for picking up items they ordered online if it saved them money over having the items delivered (see Fig. 8). Yet, when cost was removed for at home delivery, consumers showed a strong preference for free home delivery (see Fig. **9**).

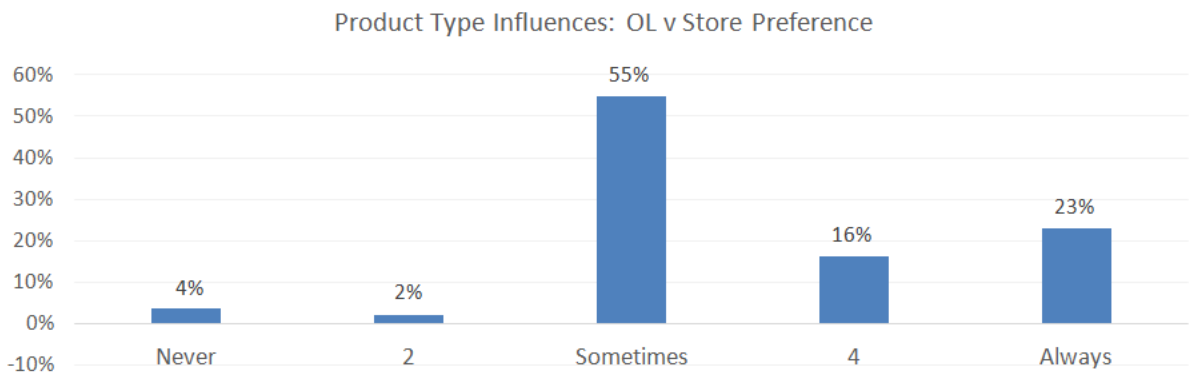

Fig. 7. Influence of Product Type on Preference for Online or In-Store Retail Format
N=222

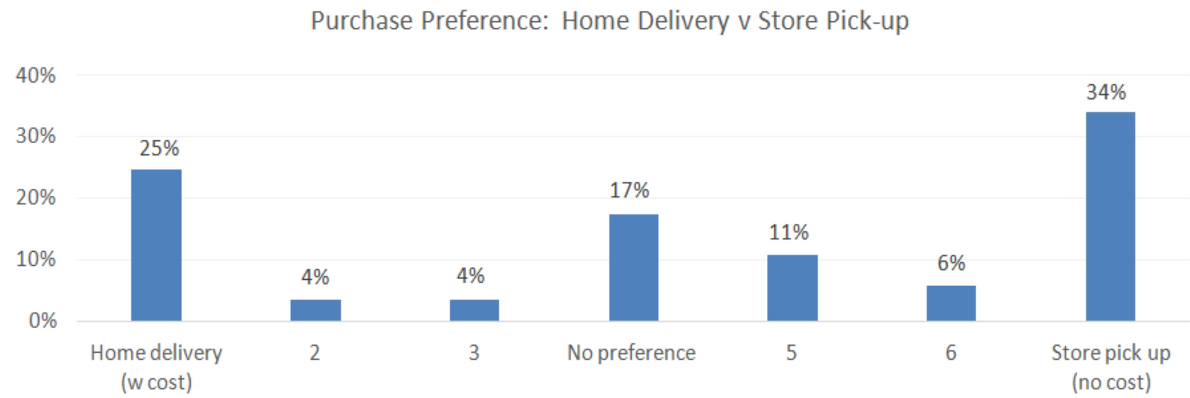

Fig. 8. Preferences for Home Delivery (with cost) vs. Store Pick Up (no cost)
N=222

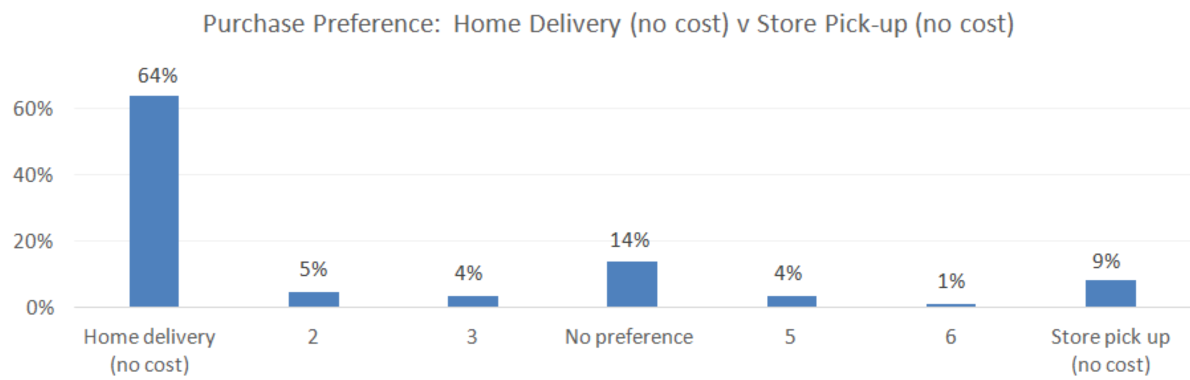

Fig. 9. Preferences for Home Delivery (no cost) vs. Store Pick up (no cost)
N=222

Further, impulse buying was considered. For in-store shoppers, 64% of respondents reported that sometimes they purchased at least one item that they did not initially intend to buy (see Fig. 10). For online shoppers, 50% of respondents reported that sometimes they purchased at least one item they did not initially intend to buy. Interestingly, it should be noted that 17% of in-store shoppers were unlikely to make an unintentional purchase while 38% of online shoppers were unlikely to make such a purchase, so it is suggested that in-store shoppers are more likely to make impulse purchases (see Fig. 10). About half of these consumers reported that ordering online and picking up at the store did not increase their purchases of unintended items (see Fig. 10).

Respondents were also asked to consider mixed retail formats to investigate whether consumers look for items in-store and then purchase online or vice versa. Respondents reported that they do use mixed retail formats. Responses of "sometimes" were almost equal for look in-store and buy online as for look online and buy in-store (see Figs 11 & 12).

Finally, in reviewing retail formats, consideration was given to the impact of gender on preferred retail format. Responses of both men and women indicated that retail format was important when comparing in-store purchases to those made online; among women, the preference was for the in-store experience over online orders while among men there was a preference for online purchases (see Table 1). In addition, women preferred catalog orders to phone orders while men had no preference relative to either option. For both men and women, online was preferred to phone and catalog orders.

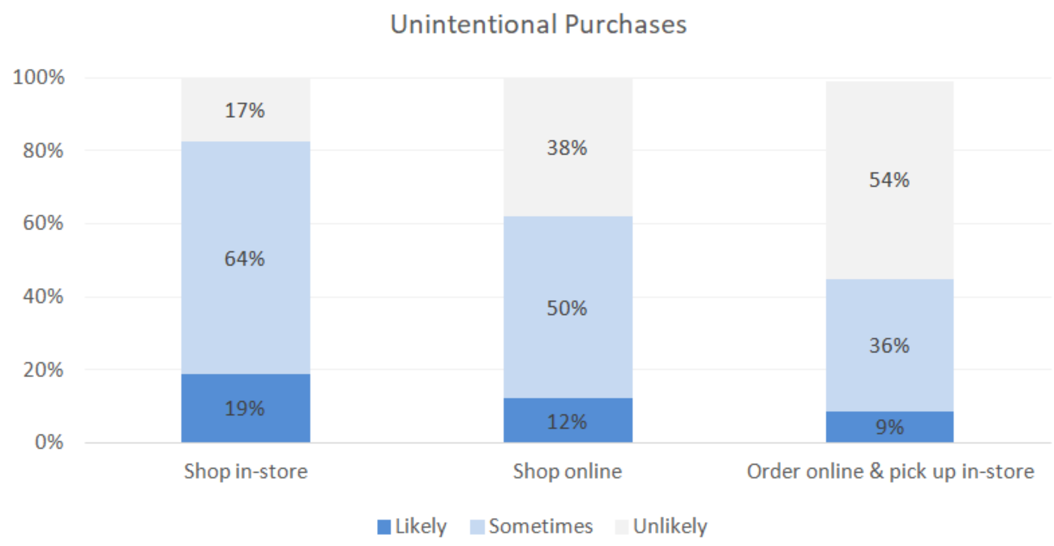

Fig. 10. Unintended Purchases (I purchased at least one item I did not initially intend to buy.)
N=222

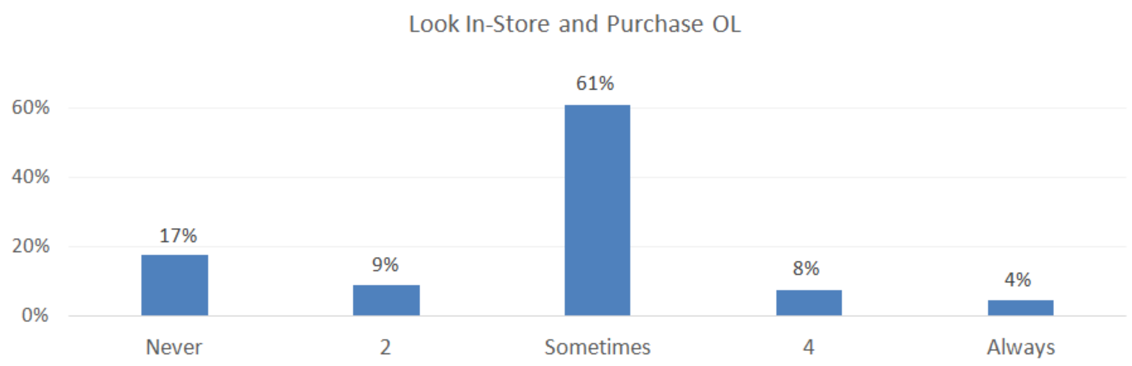

Fig. 11. Look at Items In-Store then Purchase Online
N=222

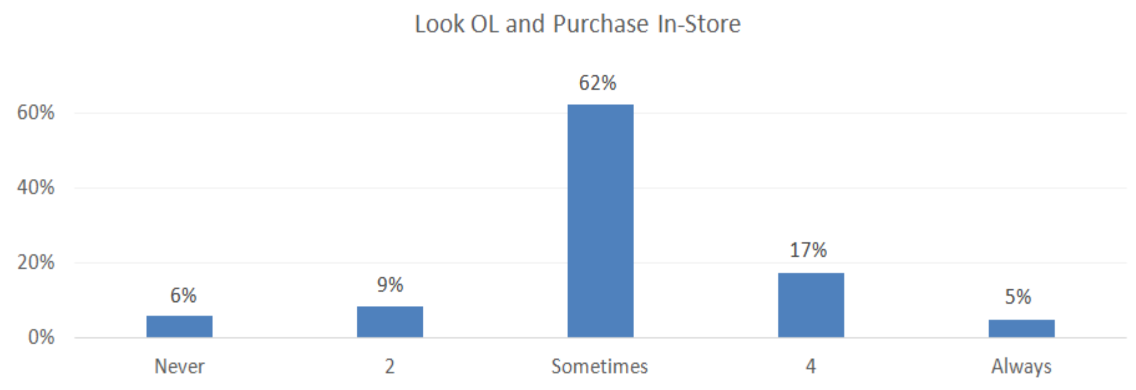

Fig. 12. Look at Items Online then Purchase In-Store
N=222

Table 1. Purchasing preference by gender

		Women	Men
Order OL v Store	Store	53%	29%
	OL	27%	47%
	NP	17%	24%
Store v Mailed Catalog	Store	82%	78%
	Catalog	7%	8%
	NP	12%	15%
Store v Phone	Store	91%	81%
	Phone	2%	5%
	NP	7%	15%
Phone v OL	OL	86%	79%
	Phone	2%	3%
	NP	12%	18%
OL v Mailed Catalog	OL	85%	83%
	Catalog	2%	2%
	NP	13%	16%
Mailed Catalog v Phone	Catalog	45%	16%
	Phone	20%	26%
	NP	36%	57%

N=222

3.3 Integration of In-Store and Online Retail Formats

The open-ended responses obtained from participants included many valid recommendations for both consumer and retailers on how to integrate online and in-store shopping.

3.3.1 Recommendations for retailers

Recommendations made for retailers by these consumers can be categorized into three main areas. They included a) use of technology to provide more information for consumers, b) options for saving consumers money, and c) delivery services.

The largest category of consumer recommendations for retailers to increase integration of in-store and online retail formats centered on opportunities for retailers to provide increased information to consumers during their shopping experience. Consumers expressed interest in having computer access available in-store to augment product search, check stock availability, provide product information, learn the location of the item in-store, and place online orders when items are out-of-stock.

The second largest category of consumer recommendations for retailers focused on saving consumers money by integrating online and in-store formats. Free shipping or delivery; discounts, promotions, and incentives; capability to use scanning technologies to ascertain product discounts (e.g., Target's Cartwheel), matching prices and sales in-store and online; and offering in-store coupons accessed via the retail website were mentioned.

The third largest category of consumer recommendations for retailers encouraged more delivery options. Free shipping regardless of the item cost; same-day pickup of products where the consumer can choose store location, order the product online, and pick it up the same day; and local pickup and delivery of purchases and returns were included.

3.3.2 Recommendations for consumers

When the participants made recommendations for ways consumers can integrate in-store and online retail formats they suggested strategies related to a) using technologies to enhance shopping while in-store, b) using technologies to enhance shopping when not in-store, and c) providing retailers with consumer feedback.

Representative comments related to using technologies to enhance shopping while in-store included bringing smartphones into stores; checking on products online while in-store; using phones to compare prices, brands, and product reviews; and using smartphones to find purchase alternatives when a physical retailer does not carry an item or is out-of-stock.

Suggestions on using technologies to enhance shopping when not in-store included following social media to get the best deals, and comparison shopping.

Some recommendations applied equally to online and in-store experiences. One example, to "be more familiar with the tools and apps available" reflected a desire to use technologies to enhance shopping both in-store and online. Similarly, using technologies to look up what is offered, both in-store and online, applies to both formats.

Opportunities for providing feedback to retailers related not only to feedback on items purchased, but also to consumer experiences while shopping in a store. One consumer commented that he could write to the retailer about potential solutions for creating an integrated environment for hybrid online/in-store shoppers.

4. DISCUSSION AND CONCLUSIONS

The demographic and digital use data reflects that the student consumers in this study were young and experienced users of computers and other digital devices. They were accustomed to using digital technology in their employee and student roles having substantial experience with computers at work and in online university courses. Additionally, they spent a noteworthy amount of time beyond their jobs using computers and mobile devices, and engaging with social media. Hence, these consumers were "computer savvy" with the skills to use these same tools in their shopping behaviors. In general, while perhaps not surprising, it is useful to note that the evidence of use of digital tools found here describes a consuming population, at least for this segment, that has the skills and capacities to shop in multiple retail formats. While very much a part of today's lifestyle, this was not true for previous time periods. Retail formats were more restricted. Early on-site retailing evolved with the advent of technologies. Mailed catalogs, telephone, and online formats all brought new avenues for consumption. Hence, change has brought choice, opportunities to select, value, and use multiple retail formats.

4.1 Post-Pandemic Implications for Consumer Format Preferences

This study found evidence that consumers, faced with increased choice in retail formats, have developed preferences. As retailers strive to meet consumer needs and produce profit, understanding of what these preferences were prior to the disruption of COVID-19 is useful in preparing for a "new normal" in retail. Both consumers and retailers were forced to make radical adjustments. The impact of COVID-19 will substantially influence post-pandemic consumer behavior.

Responses to the research questions that served as guides for this study provided benchmark consumer preference data for retail formats that retailers can build upon including: a) Q1. Which retail formats do consumers prefer? b) Q2. Which digital tools do consumers use to make purchases? c) Q3. Does delivery mode and/or product type influence retail format preference? d) Q4. Does retail format influence impulse purchasing behavior? e) Q5. Do consumers mix retail formats when making product purchases? and f) Q6. What will be the implications of COVID-19 for retail format preference?

Thus, even faced with massive retail disruption, it is the position of the authors that many of the pre-pandemic preferences and perceptions shown in this study will continue to influence post-pandemic consumer behaviors. These include:

- Preference for online and in-store retail formats over telephone or mail-based formats
- Perception that product type influences format choice
- Preference for free home delivery
- Perception that cost is a factor in delivery preference
- Perception that impulse purchases are part of the shopping experience
- Use of mixed formats including both looking in-store/purchasing online and looking online/purchasing in-store

For the consumer sample examined in this study, no preference was found for online versus in-store retail formats or vice versa. While it is possible that this finding was influenced by the technical competence of the sample, it is useful, more generally, now that larger numbers of consumers have greater experience with online shopping. With 90% of consumers having changed their shopping behaviors over an extended period as a result of the pandemic [27], habits are likely to have changed. Online and in-store format preferences by consumers will emerge in a new balance predicated on previous preferences and newer pandemic-forced mandated behaviors. Hence, the findings of this study are consistent with and provide foundational background for industry reports that although confusion exists on what “new normal” will be [57], the retail industry is resilient in meeting customer needs and leading economic recovery from the impacts of COVID-19 [28].

DISCLAIMER

The products used for this research are commonly and predominantly use products in our area of research and country. There is absolutely no conflict of interest between the authors and producers of the products because we do not intend to use these products as an avenue for any litigation but for the advancement of knowledge. Also, the research was not funded by the producing company rather it was funded by personal efforts of the authors.

CONSENT

As per international standard or university standard, respondents’ written consent has been collected and preserved by the authors.

COMPETING INTERESTS

Authors have declared that no competing interests exist.

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Peer-review history:
The peer review history for this paper can be accessed here:
https://www.sdiarticle4.com/review-history/73639