

Covid-19's Impact on Society, Fashion Trends and Consumption

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ABSTRACT

This paper aims to reflect about opinions and reports about the Covid-19 impact on society and on the fashion industry from retail, luxury market professionals and consumer behaviour researchers. The pandemic impacts are analysed under the perspective of consumer behaviour and the demand for connection and affection from the isolation caused by the pandemic. Within these two dimensions, variables like biosafety, risk, time and technology were considered to formulate reflections on the future and to visualize opportunities, external threats and the impact on the internal strengths and weaknesses of different luxury, mass and differentiation business. The analysis was formulated based on books, research on websites in the digital sphere that encompass different opinions involved in the fashion world, as well as recent trend studies. To meet new consumer demands, a brand needs to be present in the digital environment and connect to its consumers on an emotional level through its purpose, values and communication, by means of virtual and physical channels in a fluid, direct and transparent way. Small businesses may have a greater capacity to adapt to the new post-Covid-19 moment, due to the agility of responding to adversities.

Keywords: consumer behavior, Post-Crisis Fashion Trends, Covid-19.

INTRODUCTION

The arrival of the Covid-19 generated a world crisis never seen in history before, where the entire world was affected simultaneously. Industries were forced to stop or slow down, commerce closed, children stayed at home prevented from attending school, and many professionals saw their home become an office overnight. The fashion industry has been hit hard, as well as people's attitudes and behaviour. Industries, retail and society had to undergo abrupt transformations to adapt to the "new normal". Uncertainties about the future of the economy and health safety raise important questions, which can change the way people and businesses will behave. Will people behave and consume differently after the Pandemic?

Mckinsey & Company along with Business of Fashion argue that there was already a major transformation underway in the fashion industry, which will be accelerated by the advent of the pandemic. Behaviour and fashion trends that were afoot, such as the demand for ethical and sustainable practices and the increase of learning speed supported by technology, are inclined to occur faster and more eminently. With the acceleration, companies that do not adapt may fail or be forced to close its doors. To support a discussion of Covid-19's implication in the industry, research reports on Covid-19's impacts on the fashion industry were analysed, as well as articles from relevant fashion businesses publications, interviews

with professionals in the fields of consumer behaviour trends, the fashion industry, retail, technology and education. (The State of Fashion, 2020)

The subject of the study was analysed from the perspective of two dimensions classified in consumer behaviour and the demand for connection and affection arising from the isolation caused by the pandemic, exploring four variables that permeate these dimensions, classified as biosafety, risk, time and technology, which the authors considered to be strategic pillars for formulating the impacts of the crisis on the fashion industry and society.

The objective of the study is to point out the possible impacts of the crisis to support reflection on the potential responses from the luxury, differentiation and mass segments of the fashion businesses to survive and adapt to the scenario that will develop after the pandemic passes.

1. CHANGES CAUSED BY COVID-19

The whole world stopped, for the first time in history, for the same reason and practically the same way at the same time. Children stopped going to school and considerable number of stores had to close its doors. The world was turned off. Without references to previous events like this in history to anticipate what will happen next, the question arises: how will people behave and consume, after this crisis passes?

Feelings of fear regarding health, spread of the virus and Family safety are at the top of concerns related to Covid-19. Fear is also related the health of the environment and the impact of global warming. While parents are concerned about the world their children will inherit, teenagers are already turning this fear into attitudes, evidenced by the large number of teenagers from 16 countries who participated in the global school strike in 2019. WGSN, a renowned research bureau, called this sentiment Eco-anxiety. (Bell, 2020)

Instability and financial insecurity immediately follow as a major concern, many people have lost their jobs, and the future of the economy is unknown. According to a survey conducted by McKinsey & Company on the Brazilian consumer in the Covid-19 crisis, 80% of respondents feel pessimistic, 40% are afraid of losing their jobs, 50% have had their income reduced and 70% is cutting back spending. (Tripolli & Hoefel, 2020)

According to Bell (2020), in a research report for WGSN, fear seems to spread even more rapidly in the digital age in which we live, there is an emotional contagion where people imitate the feelings of others on a global scale. News of high rates of unemployment, deaths, financial crisis are delivered through television, newspapers, social media, messages over the phone, increasing the psychological weight of events announced 24 hours a day. Bell (2020) further states that the new corona virus pandemic is becoming a force for global change, and is already forging new attitudes in people's lives. Adapting to the new reality demands flexibility, resilience and above all creativity.

1.1. Fashion vs. Covid-19

Giorgio Armani, concerned about the decline of the fashion system, presented an open letter addressing considerations about the way the luxury segment was operating in order to sell more. Designer Armani argues that the current state of production and continuous delivery cycle make no sense, as it turns high quality clothing disposable with the arrival of new

products every three weeks. The designer also drew attention to the misalignment between the weather and the commercial season, when garments at store windows are not suitable for the season on the streets, remembering that the only way out would be a careful and intelligent slow down. (Armani, 2020).

In addition to Armani, an independent group of designers (Isabel Marant, Missoni, Altuzarra, Proenza Schouler, Rodarte, Mary Katrantzou among others) joined to propose a new way on how the fashion industry could and should work, including two key points: new calendar and reinvention of fashion shows. The result of the work was published on the website rewiringfashion.org and is summarized below. (Rewiring fashion, 2020).

2. Proposal for a new calendar for fashion events. A review of the current calendar which is out of sync with today's market, rethinking the timing of the shows, the periods of purchase and delivery of products;
3. The reinvention of the fashion shows, as it is argued that the format of the shows is currently out of fashion, and labels should be free to reimagine the presentation of their collections to better reach their target audience.

Cietta (2020) does not believe in a slowdown in the production of fashion collections. The Italian economist who studied companies organized in the fast-fashion model is confident that reducing the immaterial value of a piece of clothing has never been in line with the durability of material value, even though it is produced at the speed of fast fashion companies. He argues that it was not the fast-fashion companies that created the culture of disposable clothes and that even before, the durability of the clothes was already superior to the time that consumers would wear them. It was the life of the product's immaterial value that shortened and decreased, and made this fashion faster, in line with the speed that trends arrive. The author also states that the material consumption of physical products has slowed down due to the crisis, but the consumption of immaterial value has increased, because people are connected, consuming many more images, trends. The fact that people spend more time online increases the consumption of immaterial value and does not slow it down. With the intervention of scarce economic factors and resources, people will take time to resume consuming in a "normal" way, so consumers will value the immaterial aspects over the material aspects of the products. (Cietta, 2020)

Cietta (2020) assents Armani (2020) when in his letter he expresses concern related to the luxury segment trying to adapt to the fast and dynamic speed of fast-fashion, which was already born fast. The economist says that Armani is not talking about sustainability, but about the creative quality of luxury products, which loses quality trying to produce at a speed that does not meet the requirements of a luxury product. Instead of fast-fashion products being more similar to luxury products, the opposite is happening and this should not be the path of a luxury product.

However, Cietta (2020) opposes Armani (2020) arguing that a fashion product conveys an immaterial value, which now has a shorter life cycle due to hyper connection. People are saturated with a product in a shorter time compared to the past, so is almost inevitable to create a higher number of references and collections. He suggests that the solution would not be to slow down, but to find a system that can increase creative quality without interfering with market demands. Cietta (2020) believes that consumer awareness and sustainability are slow processes, and that they will not happen and establish quickly after the crisis. As

environment sustainability the author raises the issue of disposable masks and packaging and the resumption of plastic use due to health concerns, but little is said about the subject and the size of the problem it will cause. The author's suggestion is to look at fashion and the market under the aspects of the two fashion value chains, material and immaterial, and about their hybrid nature, to analyse which mechanisms allow them to slow down. Multi-brand stores would be a solution, in his point of view, where several collections from various companies are presented to the consumer, and brands would not need to create and invest high amounts of money in a single brand store, where there will be a need to present fresh products faster in order to entertain the customer. Another suggestion is to obliterate seasons and integrate the collections of several brands in multi-brand stores and present new products that do not need an excess of creation, as other labels would present collections for other periods of the year. The challenge seems to be the collaborative capacity of different stages of the fashion value chain, to join efforts and compose solutions that expand the ability to combine creativity not by the frantic renewal of products, but by the enchantment with creative quality, organized in a collaborative distribution chain, associated by new business models.

According to the research report on the fashion industry made by McKinsey & Company in cooperation with Business of Fashion, the pandemic will bring values around sustainability, intensifying discussions and further polarizing views on materialism, excessive consumption and irresponsible commercial practices (The State of Fashion, 2020). This may signal an end to extreme consumerism for some consumers who reject the idea of buying products in large volumes. Brands that are able to reorient their purposes and business models in more sustainable ways will be able to meet a more captive demand from the public than ever before. With less money available to spend, the benefits that a brand offers in addition to the product, the achievement of common purposes between the brand and its audience will be analysed more closely. (Yahn, 2020)

Paco Underhill, CEO and founder of Envirosell, a company that advises and conducts research on consumer behaviour, says that people will access what really matters to them, about things they keep or how they work and where they live. Underhill talked to the publication *Women's Wear Daily*, pointing out some behavioural changes the pandemic should incite in people:

- People will rethink where they live choosing smaller towns over big cities;
- People of all generations will develop skills related to the use of technology, while working from home. Dining rooms and bedrooms will become workstations;
- Dress differently, as many people will work from home, retire and choose comfortable clothes;
- People will cook more often at home. (Moin & Feitelberg, 2020)

The rush to escape from the agglomerations of large cities to the countryside, not only translates into the choice of place to live, it will also be present as the search for local producers and small business to consume from. Instead of choosing big brands and conglomerates, shopping locally will become increasingly strong, people will want to foster the community in which they live, choosing small business to buy, knowing they are

strengthening the feeling of localism. According to WGSN research, supporting local and community markets expresses the post-covid-19 consumer behaviour. (Bell, 2020)

Digital potentiation is also a trend pointed out by fashion professionals. Research reports and experts like Silvio Meira (2020), chairman of portodigital.org, says that so many have never learned so much in such a short time about new operating system for business in digital mode, which has been around for so long. From now on, the digital economy will be protagonist and Branding 4.0, derived from Marketing 4.0, which means the digital revolution, according to Kotler, Kartajaya e Setiawan (2017), is a new way to attract consumers. Centred on online media, such as social networks, online commerce and blogs, branding 4.0 can help to work in an onlife world, where online and offline are not parallel realities, like real and virtual, but coexist proposing new and more horizontal interactions between brands and consumers. In this sense, content becomes a priority for many businesses.

Marc Palatucci of the Future Today Institute, a research institute for risks and future opportunities, believes that online shopping will consolidate if consumers have a positive experience when they do it for the first time, especially for those who were not frequent online shoppers. (Moin & Feitelberg, 2020).

According to the State of Fashion 2020 survey by McKinsey & Company (2020), almost a quarter of consumers in the United States and Europe are expected to increase their spending via social channels. People will adapt to the broader digitalization as digital content becomes its main mode of interaction with the brand. Some technologies that took a long time to establish, such as virtual fashion shows and digital showrooms, livestream shopping and the latest 3D design tools are now being used to do business, and to be closer to consumers in the era of the digital revolution. (Yahn, 2020)

Camila Salek (2020), founder of VIMER, a visual merchandising consultancy company, talks about a new type of retail called Phygital, a marketing term that describes the union of digital experiences with physical experiences. With the proliferation of communication and interaction channels, companies seek to combine channels in an integrated frictionless way, allowing customers to make a phone call, communicate through a social media platform, and then send an email without the company losing the communication thread associated with that customer and his account history. In that way physical spaces will be reframed so that, through immersive experiences, consumers can perceive the universe of a brand and product. Salespeople cease being sales assistants to become specialists, while the merchandising abandons over-stock standards and products take their roles within a narrative that involves the consumer, the main protagonist. Technology will carry the facilities and conveniences to add to the experiences in the physical environment, which in turn is guided by humanized connections, enabling the consumer to create his own journey. The race to strengthen the digital consumer environment is intensified by the fact that people are unable to safely visit store's physical spaces, as well as they are prevented from trying on clothes when they do, leading consumers to choose the digital environment to shop. The extended period for exchanging products during the pandemic period, encourages the consumer to opt for e-commerce instead of visiting a mall where there may be crowds of people and running the risk of getting infected. (Salek, 2020)

In this uncertain time, Salek (2020) comments that is necessary to incorporate in the digital environment some premises of the construction of experiences of the physical environment,

through a specialized service, offering convenience, delivery and personalized services, seeking to circumvent the absence of the emotional side that personal relationships provide. The author states that to stand out and establish themselves at this moment, brands will have to connect deeply with their consumers through their purpose. Content, transparency, personal shopping experience are points that will make a difference when choosing who to buy from.

Carvalho (2020) says that if you are an influencer or a brand that does not know how to communicate now and if you are feeling embarrassed about communicating your content or product, perhaps it is because your product has never been relevant. The author states that, before the pandemic, the content of fashion campaigns could be false or idealized, as well as the life of digital influencers, what changes now is the willingness to continue to disseminate content in this way. Carvalho (2020) exclaims that marketing should have the role of understanding the need for a specific audience and promoting conversations about their products, to identify the need for changes, but few are willing to encourage this conversation, focusing only on sales and their own interests. The author points out that moments of crisis are also opportunities for brands to become aware of learning from human beings, and take the time to review their values and evolve, reviewing their tone of voice and speech.

In the United States, new products, services and campaigns were created that will help people and companies cope and adjust, since consumer behaviour has shifted over the past year. An US startup called Reef is on a mission to build “15-minute cities” where everything people need can be found within a short walk or bicycle ride. To this end, Reef is working in strengthening local communities, moving towards people- first, car-free urban environments that prioritize wellbeing. Also designed for wellbeing, Microsoft has announced new features for its Teams communication platform that aim to improve users’ work/life balance in the “work from home” world. It will also add a new emotional check-in feature. From now on, increasingly mindful people will look for products and services that seamlessly boost their mental wellbeing. Due to Covid-19, Airbnb was forced to lay off around 25% of its staff, in order to help former coworkers, their in-house recruiting department became a placement team for their ex-employees. People were also allowed to keep their work laptops, and their health insurance was covered for a year. (TrendWatching BV, n.d.)

In Brazil, the *Portal do Empreendedor* registered 551,153 new microentrepreneurs from March to July 2020 (16,788 more than in the same period in 2019). A series of innovative businesses with conscious purpose and a strong presence in the digital environment have emerged, throughout this pandemic, resulting in a new wave of entrepreneurs. Brazil Immersive Fashion Week was the first Latin platform for immersive fashion. The online multichannel aims to bring together brands, independent designers, artists and consumers who want to cooperate through a 100% digital narrative, thinking about the future of fashion. Another initiative in the digital sphere was Digital Favela, launched by Celso Athayde from The Favela Holding. It is a project that connects micro community influencers to major brands, with the purpose of fostering entrepreneurship in the favelas, and also for brands to broaden their communication with more than 12 million consumers in 6,000 Brazilian favelas, which move around 120 billion reais a year and are very little accessed and represented. (Giustino, 2020)

Dudu Bertholini, coordinator of the undergraduate course in fashion design at the Instituto Europeo de Design in São Paulo, quoted in a live for Business of Fashion, a speech by Giles

Lipovesty that he considers very current: “Lipovestsky argues that, at the end of the 20th century, fashion and visual arts have lost their relevance as a transformation agent. Now, with this new mindset, fashion has an opportunity to be an agent of transformation again. And this change does not come from aesthetics, colors and shapes, it comes from the purpose behind the clothes being made”. (*Live com Dudu*, n.d)

2. REFLECTIONS

The arguments presented by different authors cited in this paper help to answer the question of the study, considered from the two proposed dimensions: the first is consumer behaviour, and the second is Connection and Affection. Within these two dimensions, four variables- biosafety, risk, time and technology - guide the formulation of reflections on the future and support the conception of opportunities, external threats and the impact on the internal strengths and weaknesses of different luxury, mass and differentiation segments. Consumer behaviour within the biosafety variable is identified in the feeling called Eco-anxiety, defined as the concern with environmental health. In this sense, the premise of sustainability becomes a key factor in choosing a brand to consume from.

The environment concern must be reflected as a business practice in the production mechanisms, and be incorporated as a value by the brands and companies that wish to continue to be relevant to their consumers. The choice of materials, packaging, and the disposal of scraps of production can be a way for a company to incorporate inputs and production methods that respect the environment and add sustainable values to its brand. Cietta (2020) raises an important point in relation to sustainability with the return of using disposable materials such as masks, and also the return to single use plastic in restaurants due to health concerns, and little is being said about the subject, a setback in one point that was heading towards a disuse in this type of material. Cloth mask, washable and reusable, would be a sustainable solution to this problem, raising the accessory’s category to a fashion product, where the consumer expresses his lifestyle and connects with a brand that produced it through similar values. The use of individual reuse cups is a trend that has been happening in events, schools and parties, which can now be used when going to environments such as restaurants, so that single use plastic utensils are eliminated.

Biosafety is also identified by the fact that consumers choose to shop online instead of leaving their homes due to safety reasons. Going out to the mall or a physical store can become a dangerous adventure due to the risk of contamination, in addition to the fact that trying on clothes at stores is forbidden. Companies are facilitating and extending the exchange period in the digital and physical spheres. As Salek (2020) and Palatucci (2020) put it, it is important in the transition from the physical to the digital medium to have no friction or frustration, so that the consumer that purchases online has a positive experience and returns to shop again. From the moment the consumer decides to leave the house to go to a physical store to make a purchase, retailers need to be prepared to welcome customers and provide them with a safe and positive experience, displaying hand sanitizer at store entrance, restrict the number of people inside stores, and easy access to products that are top sellers. Service needs to be aligned with the situation, people will want to be heard and their biosafety needs respected, without pushing sales of things that are not needed.

From the perspective of the Connection and Affection dimension, biosafety outlines how the fear of contamination will determine people’s attitude towards consumption and places

where they live. Running away from big cities to smaller towns to avoid agglomeration, people will be looking to connect through a simpler way of life and will look to consume from brands and companies that are conscientious to provide attentive service. Small businesses that are close to where people live and value what is produced locally, will have greater chance of connecting with local consumers, strengthening its ties with the community through a more personalized shopping experience.

The consumption behaviour under the aspect of risk is evidenced by the uncertainty of the future economic scenario and the financial instability of people affected by the Covid-19 crisis. In this critical moment of doubts, the tendency is to pullback spending, and when spending is necessary, the choice of what to buy will be more judicious, giving priority to brands that consumers connect to, have similar values with, and are compensated with a personalized shopping experience. A handwritten thank you note, photos that communicate lifestyle on social networks, causes that resonate with its consumers and having a purpose are attitudes of a brand that will connect with its target audience.

Regarding the time variable, two trends in consumption behaviour are identified: a decrease in exacerbated consumption, with the scarcity of resources and the uncertain economic scenario, consumers will think more before spending. The deceleration of the fashion industry is also identified as a strong trend. There is a proposal for a new production calendar, aligning periods of fashion shows with purchases so that these events are in accordance with real creative capacity and market absorption. Slow-fashion, timeless designs, collections that are not defined by seasons tend to gain market share, as a post-Covid-19 consumption trend, as does the reuse of clothes with upcycling, renting and repairing clothes.

Concerning adapting to consumers new needs, the time variable characterizes into the speed to learn technology. People of all ages were forced to learn to deal with technology in order to be able to find virtually what they needed, be it groceries or virtual family reunions or remote work. Companies that were not yet in the digital sphere also had to adapt quickly, to be able to serve customers who could no longer leave their homes or had to adapt the business model to continue to exist. It is important that a brand or company digital presence is integrated with its sales channels in an aligned and coherent way, so that the interaction with its customers generates a positive experience, whether in communication or when making a sale. The trend is the digital revolution, and whoever does not join, individuals or companies, will be left behind.

Technology as a variable permeates among all the trends previously mentioned, such as shopping online, the valorization of companies that are fluidly connected between digital and physical spheres, the need for learning technology both for companies that were not in the digital environment and for people who needed to connect to perform daily tasks, such as virtual work, friends and family meetings. Being present on different platforms facilitates access by brand's target audience, and the ease of navigation gains even more relevance, when physical distribution loses space in a biosafety environment.

3. FINAL CONSIDERATIONS

Finally, the first Covid-19 vaccines have been authorized for use and several countries have begun its dissemination, marking a major turning point in the pandemic, bringing fresh optimism for a next normal in the new year. But there is another hurdle to face since some

consumers remain skeptical of Covid-19 immunization. According to the McKinsey & Company briefing note, the vast majority of US consumers surveyed believe the vaccine is important to facilitate a return to life as it was, but nearly half are “cautious adopters”, which of whom will wait up to three months to a year, after more data is available. (Covid 19: Implication for Business, 2020)

After all, people will be more connected with what they need and will use digital channels to communicate and consume, out of necessity or choice. With the restrictions that came with the pandemic, people had time to think and see what is really important to them, and this change in consumer behaviour and attitudes will impact the fashion business in one way or another. Small, medium and large companies, as well as businesses focused on the luxury, mass and differentiation segments will need to be in the online environment if they are to be where consumers are. 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 greatest potential to retain new consumers. Thus, the digital presence becomes even more important as a means of sales, communication and interaction with customers, and as a channel for creating relevant content. A customer's relationship with a brand becomes an agreement, a friendship, the brand needs to listen and understand the needs to be able to meet the precious and specific demand of its customers, the main protagonists of this relationship.

The fashion businesses focused on the mass market will feel more the low purchasing power of its target audience, more affected economically in revenue and therefore in consumption. The differentiation segment, on the other hand, needs to have its business model analysed to be in accordance with the needs of its public, which will be more demanding where they will spend their money. As for the luxury market, the slowdown may be the best solution for valuing creativity and conceiving the quality that the consumer of the luxury product appreciates. Purpose, values, social responsibility, customer service and product quality need to be aligned in all attitudes of the brand and the company, whether it is aimed at the mass, differentiation or luxury segment.

With the appreciation of small producers and local commerce, small companies have great chances of growing using the crisis as a lever to adapt their business model. Because they are small, they manage to be agile and have a close contact with their audience, quickly presenting products and solutions that meet their needs and are aligned with their customers' wishes with this new behaviour. For a new brand, or one that is already on the market and wants to remain relevant for this new consumer, it is relevant to recognise a purpose behind everything it does. The brand communication with the new consumer must be personal, the service, delivery and sales channels need to talk to each other, and be aligned with the essence of the brand. A well-done Branding that tells a true story and connects with its customers on an emotional level is a natural tendency of the brands that will relate and be relevant to their customers.

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