

## ID Cover Page

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# **Gen Z and the Digital Shopping Experience: An Analysis of Consumer Behavior and Attitudes Towards Summer Jackets Online**

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GEN Z AND THE DIGITAL SHOPPING EXPERIENCE: AN ANALYSIS OF CONSUMER  
BEHAVIOR AND ATTITUDES TOWARDS SUMMER JACKETS ONLINE

The Role of E-commerce in the Fashion Industry and the New Retail World  
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## **Abstract**

This study investigates the online shopping behavior and expectations of Generation Z (Gen Z), a significant and economically influential cohort of the global population. Focusing specifically on the online purchase of summer jackets, the research encompasses a thorough review of literature and research methodology that includes conjoint analysis and perceptual mapping. The study derives valuable findings: Online shopping has become routine, and Gen Z's online shopping patterns exhibit a strong inclination towards price sensitivity, with decision-making heavily influenced by diverse information and inspiration channels. This reflects Gen Z's core values, which prioritize aspects such as convenience, sustainability, and a keen awareness of pricing considerations. These findings serve as a basis for providing recommendations to brands and retailers on effectively adapting their strategies to meet the unique needs of Gen Z consumers.

**Keywords:** Gen Z, Fashion, Summer Jackets, E-Commerce, Omnichannel, Social Commerce, Consumer Interviews, Conjoint Analysis, Perceptual Maps

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## List of Abbreviations

<b>Abbreviation</b>	<b>Definition</b>
<b>AI</b>	Artificial Intelligence
<b>Gen Z</b>	Generation Z (Born 1997-2012)
<b>MWTP</b>	Marginal Willingness To Pay
<b>QR codes</b>	Quick Response Codes
<b>S.M.A.R.T</b>	Specific, Measurable, Achievable, Relevant, and Time-Bound.
<b>UGC</b>	User-Generated Content

# **1 Introduction**

Generation Z (Gen Z) is the world's largest generation, accounting for nearly a third (32%) of the world's global population in 2019 (Miller and Lu 2018), making it one of the most crucial, if not the most essential group for companies to address with their products moving forward to ensure financial success. In the U.S. alone, Bloomberg estimated the disposable income of Gen Z for 2021 to be \$360 billion, which has doubled within a timeframe of as little as three years (Pollard 2021). While the by-person disposable income is much lower than the one of millennials, whose median disposable household income is twice as high as the one of Gen Z (U.S. Bureau of Labor Statistics 2022), it should be noted that individuals belonging to Gen Z are still financially far from their peak. In 2022 more than half of Gen Z is still set to enter their working life, with only 48% being full/part-time or self-employed and 42% advancing their education further (GWI 2023). These figures indicate that Gen Z's impact on the overall economy will rapidly increase over the next few years following an increase in the employment ratio. Aside from the rising employment ratio, the economic footprint will also further increase through individuals advancing their careers and thus improving their financial means. These assumptions are also clearly underpinned by data showing that Gen Z individuals are more ambitious, adventurous, career-focused, and money-driven than their ancestors who belong to other generations (GWI 2023).

While both Millennials and Gen Z are officially considered Digital Natives (McClure 2022), one should recognize that while for Millennials, digital technologies were still emerging, they had already advanced much further and become the new normal by childhood time of Gen Z, where it is unimaginable growing up without access to a smartphone (Matt 2022). Growing up with digital technologies like no other generation has led Gen Z to be frequent online shoppers,

with 32% of the age group saying to shop online daily or even multiple times a day (Jungle Scout 2023).

While the financial impact already outlined the importance of Gen Z for the future of all industries, it should also be noted that Gen Z also considers themselves more conscious regarding fashion than past cohorts, displayed by an over-index of 1.13 against previous generations (GWI 2023). Bo Finneman, a partner within McKinsey's Marketing & Sales and Consumer Packaged Goods practice, said that "they're [Gen Z] looking beyond tangible products and actually trying to understand what is it that makes the company tick. What's its mission? What's its purpose? And what is it actually trying to build for us as a society?" (McKinsey 2020). While it must be acknowledged that this is not a new trend, Gen Z consumers have accelerated the trend that Millennials started (McKinsey 2020). These findings indicate the urgent need for fashion manufacturers and online retailers to target the needs of this emerging generation specifically.

The jackets and coats segment is among the most significant fashion segments, with global sales expected to amount to approximately 126.66bn US\$ by 2027 (male 56.47bn US\$, female 54.96, children 15.23bn) and 2.58 bn pieces to be sold by 2027 (Statista 2022b, Statista 2022c, Statista 2022d). While the jacket sales volume "only" reflects 1.33% of the overall fashion apparel sales volume, the value amounts to approximately 7.30% of the entire industry, indicating the paramount importance of the jackets and coats segment for future success (Statista 2022a). For an online retailer, it is essential to appeal with their offering as much as possible to the target audience, as jackets are considered long-lasting products that are often worn for multiple years, which are also required in lower quantities as opposed to shirts for instance as reflected by the fact that the average volume for females which has the higher value amounts to 0.11 jacket and coat pieces being bought in 2023 (Statista 2022d). Considering various factors, summer jackets are especially appealing to address within this segment.

Considering the research project takes place in spring, consumers are likely not actively looking into purchasing winter jackets, which could influence their willingness to participate in the study and their attitude towards the product. Consumers are generally not looking for winter jackets in summer, so the willingness to pay for them could be lower than when they are looking to buy a winter jacket. Additionally, the focus on summer jackets addresses a broader geographic region. Firstly, temperatures around the 20 degrees Celsius mark can be observed in a wide range of countries, which allows for a more general approach. Secondly, if winter jackets were chosen, one might not even be able to cover a nation but would have to go based on region, as there can be severe regional differences (e.g., in the USA, California vs. Alaska). The work project aims to understand better how Gen Z behaves when buying summer jackets and what expectations they have throughout the process of buying their product. The key objective of this work is to guide how brands can potentially adapt their strategy to satisfy the needs and expectations of this generation. To be able to provide recommendations, two research questions were formulated (RQ1 and RQ2).

The first research question, RQ1 – *“How does Gen Z behave when purchasing jackets online?”* – was developed to understand how consumers are influenced when deciding between a range of jackets that differ in their attributes and levels.

The second research question, RQ2 – *“What do consumers expect from fashion brands in their shopping experience and the purchased product?”* – was designed to understand how those online retailers are perceived by Gen Z. The analysis of this question allows the researchers to understand better the strengths and weaknesses of each of the chosen online retailers and how they can adapt their customer journey.

In the end, the findings of both research questions can be mapped together to identify areas of improvement for online retailers to appeal more to consumers belonging to Gen Z. This

objective is addressed by the third research question, RQ3 –“ *How can Brands adapt their strategy to the shift of needs in this generation?*”.

The work project is structured into six chapters. Following the introduction, the researchers conducted an in-depth literature review on the role of E-commerce in the fashion industry, Gen Z shopping behavior, and strategies to reach Gen Z. Chapter Three then explains the theoretical framework of the research methodology and the construction of the research instruments, before in Chapter Four the results of these research approaches are presented. In addition, to the two primary research methodologies applied, two different experiments were carried out in Chapter Five. Firstly, the researchers developed a survey to test whether strategies developed by the researchers increase the likelihood of consumers buying at a particular retailer. The second experiment intends to understand how far Artificial Intelligence (AI) based chatbots have advanced and whether they already have a use in conducting conjoint analysis. The work then closes with the conclusion.

## **2 Literature review**

### **2.1 The Impact of E-commerce on the Fashion Industry**

The advancement in digitalization led to the rapid expansion of E-commerce, which profoundly impacted the global economy. E-commerce, which stands for electronic commerce, refers to the online platform operated by a vendor for directly selling goods or services to customers. This platform is typically equipped with a digital shopping cart or basket system and offers a variety of payment options (Wienclaw 2021; Amin, Kansana, and Majid 2016).

The predominant forms of E-commerce include business-to-business (B2B), business-to-consumer (B2C), business-to-government (B2G), consumer-to-consumer (C2C), and mobile commerce (m-commerce). In contrast to being merely an additional means of enhancing traditional business practices, E-commerce represents a comprehensive transformation of such practices. The utilization of E-commerce enables consumers to exercise greater autonomy in selecting the timing and location of purchasing decisions and offering access to research on the product, vendor, and other available options. Thanks to advancements in information technology, customers no longer have to physically visit a store and manually search through aisles to find products to purchase. Instead, they can conveniently complete these tasks electronically by utilizing e-commerce retailers to shop online. E-commerce has brought about transformative effects across various business sectors, from customer experience to product development. It has enabled novel types of information-based business processes to connect and engage with customers, including online advertising and marketing, and customer service (Wienclaw 2021; Amin, Kansana, and Majid 2016).

In the current era, most contemporary businesses maintain an online presence, with online retailing being one of the most prevalent E-commerce applications. In this context, the organization's website serves as the digital counterpart of a physical storefront, and its various

web pages represent the electronic counterparts of traditional store aisles. By utilizing links to various product categories and conducting searches based on characteristics such as keywords, titles, or product names, customers can conveniently browse through "aisles" and directly access desired products through a search function (Wienclaw 2021). Online retailers offer consumers a variety of digital goods and services tailored to digital technology usage while also being influenced by the new consumption patterns associated with these technologies (Hagberg, Sundstrom, and Egels-Zandén 2016).

As the rising digitalization directly affects the fashion industry, fashion business models and formats, communication channels with consumers, and customer journey touchpoints are undergoing changes and advancements through commonly adopted processes (Portela, Kalbaska, and Cantoni 2021). Those dynamic changes and the increasingly high competitiveness in this market have also embraced the philosophy of the fast fashion business model (Cachon and Swinney 2011).

Fast fashion refers to a business model that incorporates three critical elements: a rapid response to changing market demands, frequent changes in product assortments, and stylish designs at reasonable prices. The primary value proposition of fast fashion is to offer trendy and affordable apparel to consumers. Well-known fast fashion retailers such as H&M and Zara leverage quick-response production strategies to hasten the delivery of their products to stores. By doing so, they are able to capitalize on developing market trends and provide enhanced value to customers. To expedite the production process, fast fashion retailers rely on nearby suppliers located in countries such as Portugal, Morocco, Bulgaria, Romania, and Turkey, which are in close proximity to their target markets. Furthermore, they prioritize commercial needs during the design phase, thus reducing the time spent on design iterations and

standardizing methods and materials to minimize the efforts required to create samples. This approach enables them to significantly reduce the design-to-market time for a particular item, with some products taking as little as six weeks to launch from inception. By combining supply chain agility with constant product introductions, fast fashion retailers attract customers who seek variety and are highly fashion-conscious. The ability to quickly respond to shifting market preferences and introduce new products on a regular basis enables fast fashion retailers to remain relevant and competitive in the highly fragmented online retail landscape (Caro and de Albeniz 2014). While this approach has proven highly effective for many fast fashion retailers, concerns have been raised about its sustainability as more and more consumers question the ethics of fast fashion (Hines and Bruce 2007).

It can be stated that information availability, technology, and communication advancements are setting new benchmarks for customer expectations, increasing competitiveness and rise of digitally driven marketplaces, and leading fashion retailers and brands into applying new methods of attracting and retaining new and existing customers to traditional stores (Vecchi and Buckley 2016). Customers now have more specific demands and requirements, increasing the complexity of meeting their needs (Schallmo 2016). Alterations in the dynamics are driven by raising awareness and engagement of customers with the brand (Vecchi and Buckley 2016). This shift has prompted fashion brands and retailers to offer products and services through multiple channels, online and offline (Schoenbachler and Gordon 2002; Berman and Thelen 2004). For instance, customers research a fashion product online, buy it at a physical retailer, and pay for it using a smart device app. In addition, the emergence of the COVID-19 pandemic has hastened the advancement of E-commerce and emphasized the importance of merging offline and online sales channels. As a result, the fashion retail industry must undergo a substantial transformation where the promotion of digital presence and online sales take center

stage. Consequently, physical stores will be remodeled into showrooms showcasing selected products physically while offering others online, thereby promoting the integration of both physical and digital environments (Schallmo 2016; Herrero-Crespo et al. 2021).

## **2.2 The New Retail World**

The adaption of innovative technologies and changing consumer behavioral patterns call for continuously changing retail practices. As a result, the fashion industry is actively participating in the biggest change in decades by defining new ways of retailing (Herrero-Crespo et al. 2021).

### **2.2.1 Multichannel Management**

Multichannel retailing is the practice of a retailer offering its products and services through different channels. The channels which have been defined by Neslin et al. (2006, 69) as “mediums through which the firm and the customer interact,” can be subdivided into the traditional offline channel, which involves physically visiting a store or location - known as brick and mortar, online channels such as Web store, and mobile channels (Verhoef, Kannan, and Inman 2015; Jucevski et al. 2019). By following the multichannel approach, fashion retailers can reach a broader range of consumers and can cater to customers' preferences, resulting in a positive customer experience (Koumbis 2020).

The customer experience, the experience that customers go through when interacting with a brand, may be conceptualized as a customer's journey. By doing so, Lemon and Verhoef (2016) introduced the concept of a customer journey in three phases (see Figure 1). The first stage, *pre-purchase*, includes all facets of a customer's encounter with the brand and surroundings prior to making a purchase. The second stage, *purchase*, consists of every customer interaction, from choice to payment, with the brand and its surroundings throughout the actual purchase event. The third stage, *post-purchase*, refers to customers' interactions with a brand and its surroundings after the purchase phase, like usage and service requests.

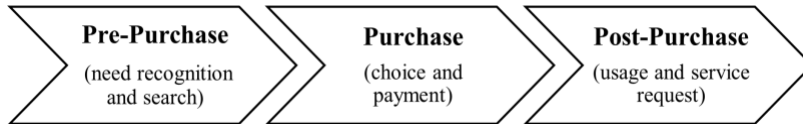


Figure 1: Lemon and Verhoef (2016)

Depending on the customer's journey and what they aim to accomplish, customers choose different channels to interact with brands (Barann et al. 2020). Existing literature indicates that customers tend to research and examine products and services via one channel type, buy them in another, and collect and return them in another channel, as Berman and Thelen (2004) reported. As an example, in the pre-purchase phase, consumers now have the ability to leverage their smartphones to compare prices, explore alternative options, and select a payment method to utilize for physical in-store purchases or online orders. In the subsequent stage, they have the flexibility to either pick up the product from a physical store or opt for home delivery (Jocovski et al. 2019). Through the internet as a channel, consumers are provided information about a product limited to price comparisons, specifications, and availability. However, especially in the context of fashion, consumers also require to touch and feel the product. As a result, the emerging behavior of gathering information in physical stores and making informed decisions to purchase the product online is usually motivated by convenience and price differences. The ease of access to online product research through smartphones and other digital devices has contributed to the increasing trend - defined as showrooming, among consumers (Schneider and Zielke 2020; Basak et al. 2017).

Achieving a comprehensive understanding of the factors that influence customer behavior in selecting channels for purchasing products is of paramount importance in contemporary retail management. In this regard, the framework developed by Neslin et al. (2006) is crucial in enhancing retailers' comprehension of customers' decision-making processes regarding channel selection. By comprehending the underlying factors that impact customer behavior in

choosing purchasing channels, brands and retailers can identify the most effective touchpoints to influence customer decisions and provide a personalized and engaging shopping experience. To identify what determines a customer's channel choice, Neslin et al. (2006) have summarized six basic determinants:

1. *Marketing efforts*: Channeling customers to the internet through email marketing and promotional activities that direct them towards specific channels.
2. *Channel attributes*: Ease of use, Price, Esthetic appeal, Assortment.
3. *Channel integration*: Smooth switching between channel A and channel B.
4. *Social influence*: Customers tend to choose channels based on the belief that others similar to them also use them (Verhoef et al. 2005).
5. *Situational factors*: Physical Setting, including weather; Social Setting, such as shopping with friends; Antecedent State, i.e., mood; Temporal Issues, such as time constraints or the urgency of purchase; Task Definition, such as the type of product being sought (Nicholson, Clarke, and Blakemore 2002).

Considering the determinants that impact customer channel choice, the development of a well-integrated multichannel strategy requires retailers to establish several linkages among all their channels. A successful multichannel strategy should include cohesive promotions, consistent product offerings across channels, an integrated information system that shares customer, pricing, and inventory data, and a process for in-store pick-up of online or catalog purchases (Berman and Thelen 2004).

*Highly integrated promotions* across channels enable customers to use each promotional forum in the best possible way. In fact, cross-promotion strategies have been found to be effective in encouraging customers to use multiple channels. Those opportunities may include digital in-

store kiosks that allow in-store customers to order products that are currently unavailable without additional delivery fees (Berman and Thelen 2004).

*The matter of product consistency across channels* arises, as a limited product overlap across channels would result in an inconsistent image. At the same time, excessive overlap may result in the loss of possible sales. As often seen in fashion retail, some online products cannot be purchased in traditional outlets, allowing retailers to reach the same customer base without increasing the cost of operating their stores. To achieve more consistency across channels, a strategy is to ensure the website heavily features popular selling items that are also available in physical store locations (Berman and Thelen 2004).

*Integrated information systems* that share customer, pricing, and inventory-based information are needed to effectively manage a multichannel system. By using order management applications, customer order information can be provided across all channels, enabling customers to return online purchases in-store. Besides customer information, sharing in-stock information allows customers to check on the availability of products in particular geographic areas. When linking channels, constant communication is vital to ensure the exact pricing across all channels (Berman and Thelen 2004).

*Customers favor in-store pick-up of goods purchased online*, as it allows them to bypass shipping and handling fees, avoid the hassle of navigating a large retail store, and save time by not having to search for products that may not be in inventory. Additionally, store pick-up enables shoppers to obtain their purchased items on the same day (Berman and Thelen 2004).

To further explore the potential advantages of a well-integrated multichannel strategy for fashion retailers and brands, it is essential to examine the specific benefits highlighted by Stojkovic et al. (2016) based on the analysis of Poloian (2013) and Kotler and Keller (2009).

The potential advantages associated with a well-integrated multichannel strategy for fashion retailers and brands are as follows:

1. Expanded customer base: Retailers can reach customers in local, national, and global markets that would not be accessible through only one channel.
2. Customer convenience: Customers save time and money by avoiding the need to physically visit a traditional store, mainly since many stores have limited hours. Catalogs and the internet provide longer working hours and greater interaction possibilities.
3. A growing number of multichannel consumers: More and more consumers expect companies they shop at to be multichannel.
4. Risk balancing: Companies gain a competitive edge using multichannel options, allowing them to focus on a specific channel, especially during economic instability.
5. Greater market coverage: The company can offer products in multiple locations. Research has shown that consumers who use multiple channels tend to spend more and be more profitable than those who use only one channel.
6. Channel cost reduction: Internet sales incur lower costs than renting or constructing expensive physical stores, requiring less staff to operate.
7. A greater level of sales customization: A company can more readily accommodate customer requests by having multiple channels available. This allows them to provide specialized support, such as hiring technical staff to sell complex equipment or offering online assistance to consumers in remote areas.

### **2.2.2 Omnichannel Management**

Regardless of the channel choice, customers anticipate a consistent, cohesive experience when engaging with brands and their offerings (Carson 2020). This has given rise to the concept of

omnichannel management, which aims to create seamless customer experiences by leveraging the interplay between channels (Jocevski et al. 2019).

The omnichannel approach is viewed as a progression from the multichannel strategy. While the multichannel approach focuses primarily on retail channels, the omnichannel environment emphasizes the interaction between brands and channels (Verhoef et al. 2015). To determine the drivers of newly observed shopping behaviors, a customer-centric view is used for the omnichannel retailing model (Jocevski et al. 2019). Thus far, physical and online channels have been operated separately. However, with the adoption of an omnichannel strategy, customers can freely switch between traditional stores, online platforms, and mobile devices throughout the same transaction process. Also, including “digital channels,” containing mobile internet and social media, has supplemented traditional online and physical channels in a manner distinct from multichannel management (Piotrowicz and Cuthbertson 2014).

Compared to multichannel management, omnichannel management is a more advanced system that creates value from both the customer's and the organization's perspective. It promotes greater integration using sophisticated retail and consumer technologies. In the omnichannel approach, adding new digital touchpoints to the customer journey may increase customer satisfaction, brand allegiance, and the frequency of purchases by giving consumers greater authority over their brand journey decisions (Pauwels and Neslin 2015; Aichner and Gruber 2017).

When discussing digital channels and touchpoints along a customer’s journey distinguishing is essential. With this, a digital channel refers to a group of digital devices capable of connecting to the internet, allowing consumers to explore and purchase products from an E-commerce vendor. On the other hand, digital touchpoints refer to a specific digital shopping format, such as a shopping application for mobile devices, that a retailer employs to provide customers with

an online retail experience (Wagner, Schramm-Klein, and Steinmann 2020). It may be challenging to provide an exhaustive list of all the various types of digital touchpoints due to frequent innovations. However, digital touchpoints may include mobile apps, online advertising, search results, social network pages/profiles, online influencers, blogs, live chats, price comparison websites, online intermediaries, and virtual assistants (Salvietti, Ieva, and Ziliani 2021).

Although online shopping is quickly gaining popularity, certain consumers still value physical experiences, especially in areas such as fashion. Therefore, omnichannel management must continuously keep up with technological trends and invest in equipping physical stores with up-to-date technologies, involving adjustments to store layouts, the ambiance in stores, interactions between customers and employees, and in-store technology use (Rigby 2011; Salvietti, Ieva, and Ziliani 2021; Matos, Duraó, and Magano 2022). According to Rosenblum and Kilcourse (2013), the most widely implemented digital touchpoints in-store include interactive info kiosks, electronic displays, electronic checkout, and visibility login, for instance, camera monitoring. These technologies can support customers in their decision-making process as they provide access to product information, complete purchase orders, and verify product availability (Vakulenko, Hellström, and Oghazi 2018; Bodhani 2012 quoted in Salvietti, Ieva, and Ziliani 2021).

To enhance customer understanding of the product and brand, electronic displays, interactive info kiosks, and QR codes are utilized to provide interactive and engaging content. On the other hand, Beacon technologies are utilized to engage customers through their mobile devices while shopping in-store. These technologies send tailored messages and exclusive offers to generate interest in specific products and encourage customers to make impulsive purchases (El Azhari and Bennett 2015; Savastano et al. 2016 quoted in Salvietti, Ieva, and Ziliani 2021).

With all the new possibilities for enhancing the shopping experience, it should be recognized that not all customers desire the same degree of technological interaction. Diverse customers' expectations regarding digital touchpoints become especially visible when differentiating between generations (Piotrowicz and Cuthbertson 2014). New digital touchpoints are especially appealing to younger generations, who are digital natives and prefer to engage with technology-driven channels that provide enhanced shopping experiences. Gen Z is already embracing and interacting with omnichannel platforms, making them a promising target for retailers looking towards the future (Matos, Durao, and Magano 2022). The channels and the way customers interact with the retailer should be freely selectable, and in-store technology should expand rather than restrict the customer experience. To answer diverse customer requirements, the best approach might be combining in-store options: seamless digital touchpoint, physical product to touch and try, and sales assistant (Piotrowicz and Cuthbertson 2014).

### **2.3 Generation Z**

Millennials, who are defined as being born anywhere between 1981 and 1996 (Dimock 2018), have been in the spotlight of marketers for decades. As a result, research on these individuals' consumer behavior and shopping habits has been done extensively over the past few years. It is not surprising that millennials have become of great interest and an important target for brands. Not only are these individuals one of the largest generation groups that exist (Lantos 2014), but they also hold a significant level of purchasing power (Kraljević and Filipović 2017). Generation Y, as millennials are often referred to, distinguishes themselves from previous generations by being savvy technology users. Their constant connectivity and online engagement enable brands to create a buying behavior profile as millennials expose and share their tastes and preferences on the Internet (Moreno et al. 2017). Nevertheless, as years passed by, a new and attractive generation of consumers emerged, and marketers shifted their focus and attention to this new cohort. This post-millennial generation, more commonly referred to as Gen Z, shares many characteristics with Generation Y. However, contrary to millennials who grew up with the development of technology, Gen Z was born in a digital world where smartphones and social media were already instantly available and accessible. Because of this, Zoomers, as members of this generation are commonly referred to, rapidly became the most tech-savvy generation ever. (Kahawandala, Peter, and Niwunhella 2020). Consequently, brands need to start adapting their strategies to this new cohort so they can better reach this promising group of digital consumers.

There is substantial discussion and debate regarding where Gen Z begins and where it ends (Thangavel, Pathak, and Chandra 2019). While some researchers have drawn the line that Gen Z started somewhere between 1995 and 1997 and ended around 2010 or 2012, others have even presented plausible arguments defending that it started after 2000 (Seemiller and Grace 2019). Nevertheless, the most consensus definition among scholars defines Gen Z as anyone born

between 1997 and 2012 (Goldring and Azab 2020). As a result, this is the range that will be adopted in this research.

Gen Z is becoming a leading consumer in the fashion industry. The reality is that this sector is facing a turning point as the mainstream consumer is shifting from millennials to Gen Z (Wang 2021). Zoomers are unlike any other generation and represent a high potential target for brands. However, for that to happen, marketers need to understand the behavior and consumption habits behind this generation.

As previously mentioned, Gen Z grew up in a digitally connected world, which makes them extremely comfortable with technology. Not only do online platforms take a significant role in Gen Z's lives, but they are also constantly present in their routines. They use them to connect with people, look for information and even browse and make online purchases. In fact, Gen Z is the generation that contributes more actively to online shopping and purchases, and this behavior is increasing more than ever before (Ayuni 2019). For this reason, to attract this generational group of consumers, it is fundamental that brands know how to tailor to this cohort digitally. This becomes particularly important as post-millennials believe that a company without an online presence is practically nonexistent (Sladek and Grabinger 2014).

In addition, targeting Gen Z becomes especially attractive to brands since Zoomers consume more digital content than any other age group, making them highly susceptible to being exposed to digital advertising on social media (Djafarova and Bowes 2021).

Furthermore, post-millennials are also becoming a growing and leading consumer group in the fashion industry. Gen Z's strong purchasing power within the fashion industry accounts for 150 billion dollars in the US (Wang 2021).

In a marketplace where this generation is exposed to infinite options, platforms, and information, marketers need to understand Gen Z's purchasing behavior to capture their attention and become market leaders (Kahawandala, Peter, and Niwunhella 2020). As a result,

for brands to address the needs of Gen Z, they must understand this generation's very different shopping habits, preferences, and expectations.

As consumers, Gen Z is characterized by being a technology-oriented generation. They grew up in a world where the convenience and accessibility of online shopping have always been present: consumers can access and compare various products and prices, look for reviews, and even engage and connect with brands. Thus, the easiness, variety, and flexibility of the shopping experience have drowned many customers into shopping online, making this a popular practice among Gen Z consumers.

Throughout the Covid-19 pandemic, many customers have converted from mainly shopping in-store to making their purchases online, and this practice has remained part of consumers' routines. In fact, 28% of Gen Z consumers admit they are more inclined to shop online than ever (Skeldon 2020), while more than 50% agree they prefer online purchases due to convenience and lower prices available (Wang 2021).

Furthermore, Gen Z consumers are less brand loyal than previous generations. In contrast with millennials, Zoomers do not buy products solely based on the brand name (Thangavel, Pathak, and Chandra 2019). With the immense amount of information this cohort is exposed to, such as product reviews and comparisons, brand loyalty is becoming less significant to Gen Z consumers (Thangavel, Pathak, and Chandra 2019). Instead, Zoomers expect brands to be the ones to capture their attention and fulfill their needs. If brands fail to address their demands and expectations, consumers do not feel valued and disengage from brands (Beall 2016).

On the other hand, if companies thrive in addressing Gen Z beliefs and catering to their preferences, consumers will reciprocate and are more likely to support and embrace companies that share their principles (Wang 2021). As a result, when Gen Z consumers see the brands'

efforts and commitment to represent their values and stand for social causes they support, Zoomers are more invested in spending money on them (Brannigan 2020, quoted in Wang 2021).

## **2.4 Shopping Preferences of Gen Z within the Fashion Industry**

As mentioned in the previous chapter, Gen Z consumers are very distinct from previous generations. For this reason, this cohort presents some particular preferences, motivations, and values when making fashion purchases.

### **2.4.1 Consumer Shopping Motives**

Researchers have identified two significant motives behind Zoomers' buying decision-making process: utilitarian and hedonic motives.

In the work of Agrawal (2022), the author refers to utilitarian motives as purchase decisions based on rational thinking and logical choices (quoted in Okado 2005). This means consumers seek products' economic and functional values when making purchase decisions. Hedonic motives, on the other hand, arise when customers pursue personal and social motivations when shopping. These include a desire for feelings such as fun, entertainment, communication, interactions, and sensory stimulation (Pandey and Chawla 2018; Sramova and Pavelka 2019, quoted in Agrawal 2022).

Both utilitarian and hedonic motives play a critical and significant role in consumers' shopping behaviors and are essential to understand what drives Gen Z consumers to online shopping.

### **2.4.2 Price Conscious**

Similarly to millennials, Gen Z consumers are price conscious. This means that, when shopping, Zoomers are interested in getting the best deal (Thangavel, Pathak, and Chandra 2019).

The reality is that Gen Z consumers perceive economic value when making purchases at discounted prices or finding good deals. As a result, Zoomers often turn to online shopping because of the various monetary incentives they are given, such as freebies, discount coupons, and cashback offers (Agrawal 2022).

Gen Z consumers are, for this reason, attracted to companies that offer financial rewards on their online platforms. Thus, many brands create these incentives to attract young consumers. ASOS, for instance, offers a 15% off total checkout for new customers and Shein a 10% discount when customers sign up for the newsletter.

The reality is that Gen Z consumers naturally dedicate time to research online to find the best deals and look for promotion codes and are interested when brands offer them opportunities to reduce prices. Amid endless online shops and options available, Zoomers want to perceive some gain in their shopping experience, whether that is in the form of free products or significant discounts (Thangavel, Pathak, and Chandra 2019).

### **2.4.3 Convenience**

Gen Z consumers are not only extremely price conscious when making purchases but also value convenience as second utilitarian motive (Thangavel, Pathak, and Chandra 2019). Hence, online shopping has become extremely popular among this generation of shoppers.

Consumers of this cohort turn to online shopping because of its various benefits. They believe the flexibility and the accessibility of information add to their experience.

Firstly, Zoomers consider online shopping allows them to browse various products and brands. The reality is that the immense amount of information available online allows this cohort of consumers, who is so comfortable with technology, to gather information about different products, compare brands and prices, and, therefore, make the best purchasing decisions. Contrary to physical stores, online shopping offers a wider selection of products and choices, allowing consumers instantaneous and efficient access to information about various brands and

an array of selections (Agrawal 2022). In addition, to facilitate their research and avoid being overwhelmed by overchoice, many young consumers make use of search filters on E-commerce platforms (Thangavel, Pathak, and Chandra 2019). This allows them to display the best options and helps them make purchase decisions.

Secondly, Gen Z consumers value the flexibility online shopping gives them. It allows Zoomers to browse and shop anywhere, at any time, without being restricted to store schedules or the availability of brands in certain locations (Agrawal 2022).

The reality is that Gen Z consumers can make purchases and have their packages delivered to their addresses without having to leave their houses. Thus, these consumers enjoy that online shopping allows them to save time, effort (Sramova and Pavelka 2019, quoted in Agrawal, 2022), and even the cost of traveling (Davis, Smith, and Lang 2017).

Given this, post-millennials attribute and appreciate the easiness and convenience of online shopping to factors such as digital payments and faster transactions (Priporas, Stylos, and Fotiadis, 2017), doorstep delivery (Thangavel, Pathak, and Chandra 2019), not having to wait in lines (Yarrow 2014), and avoiding crowds and accessing products that do not exist in the places where consumers live (Almarashdeh et al. 2019). As a result, all these factors contribute to online shopping being the preferred method of Gen Z consumers for making purchases (Muralidhar 2019).

Although price discounts have a positive and important impact on online shopping purchases (Halik and Nugroho 2022), utilitarian motives, such as monetary incentives and the convenience of online shopping, are not enough to convert customers, especially Zoomers, who are so digitally connected to people and brands.

As mentioned above, consumers also have hedonic motivations when shopping online. They pursue enjoyment, gratification, and sensory stimulation in their purchasing experience. As a

result, Gen Z consumers perceive buying fashion apparel as an entertaining, engaging, and gratifying experience. They seek to learn, explore, and have fun when browsing and shopping online (Agrawal 2022). In addition, Zoomers turn to online shopping for inspiration and to discover new trends, arrivals, and products (Arnold and Reynolds 2003; Horvath and Adiguzel 2018, quoted in Agrawal 2022). For this reason, Gen Z consumers need to be engaged with visual cues, and stimulating and interesting content from brands to retrieve positive and enjoyable hedonic values from their shopping experience (Halik and Nugroho 2022).

#### **2.4.4 Uniqueness**

Literature shows that post-millennials see fashion very differently from previous generations. Contrary to millennials, who are highly materialist, status-driven, and brand-conscious (Ladhari, Gonthier, and Lajante 2019), Gen Z does not perceive fashion as a form of belonging and prestige. Nevertheless, they believe fashion is an extension of themselves and a reflection of their personality (Elan 2020). As a result, this generation makes choices and purchases based on the belief that fashion is not for status but yet a manifestation of who they are.

Gen Z likes to add creative patterns and designs to their wardrobes to develop their style (Barger; quoted in Wang 2021) and look unique while finding inspiration and keeping up with the current trends on social media (Muralidhar 2019). This leads to one of the main traits that characterize Gen Z and how they perceive fashion. When purchasing fashion apparel, Gen Z consumers deeply value the uniqueness and personalization of items and want the fashion brands they wear to mirror their values and represent themselves (Nanda 2020). They are constantly looking for what is new and are characterized by their audacity and confidence in their style (Muralidhar 2019). Therefore, Zoomers enjoy customized purchases and the personalization of products (Wang 2021). This way, they can demonstrate their individuality and creativity through the fashion products and brands they interact with (Kapusy and Lógó 2017).

Furthermore, it is essential to mention Gen Z consumers are extremely design-conscious (Kapusy and Lógó 2017). As mentioned above, this cohort enjoys using different fabrics and patterns to make them feel unique, keep up with the new trends and create an esthetic that expresses who they are. For this reason, Gen Z consumers deeply value esthetic qualities such as colors and patterns when making fashion purchases (Kapusy and Lógó 2017).

Also, just like millennials, Gen Z consumers value the quality of the materials (Djafarova and Fouts 2022). The textile and fabric of which the apparel is made are often associated with resistance and durability, so this also plays a substantial factor when making a purchase decision. (Aakko and Niinimaki, 2021)

#### **2.4.5 Sustainability Consciousness**

More than ever, young people are concerned about environmental and social issues, and Zoomers were the first generation to actively start advocating for change in the world.

Gen Z values sustainability more than any previous cohort and expects brands to commit to addressing sustainability issues and supporting their values. The reality is that sustainability is a primary concern when buying fashion apparel, and because of this, Gen Z consumers are changing the fashion industry (Chaturvedi, Kulshreshtha, and Tripathi 2020).

Being extremely aware of the negative impact the fashion sector can have on the environment and the immense amount of textile waste and pollution this produces, these young consumers have become more interested in living an eco-friendly lifestyle (Adnan, Ahmad, and Khan 2017). They value sustainable and environmentally friendly materials in the textiles that make up the clothes they wear and buy (Chaturvedi, Kulshreshtha, and Tripathi 2020). Also, they deeply cherish companies' efforts to become sustainable, such as using recycled packaging or having eco-friendly apparel production.

Furthermore, according to a Sigearth's report, Gen Z consumers have a high desire to buy and spend on sustainable products. While 62% of Gen Z consumers are interested in buying from sustainable brands, 54% admit they are even willing to pay a premium price of up to 10% (quoted in Wang 2021).

Fashion brands, however, should be careful and responsible in promoting and advertising sustainability in their products. If this does not correspond to consumers' expectations or raises some skepticism, brands could be perceived as greenwashing, and consumers can even boycott these brands (Bytof and Ritch 2023). As a result, Gen Z deeply values sustainability as long as they perceive brands are making actual efforts to address environmental and social causes regarding the materials, suppliers, and production of their apparel.

Nevertheless, the literature suggests that Gen Z still shows some inconsistency and imbalance regarding sustainability support attitudes and their actual sustainable fashion consumption (Pencarelli et al., 2019). While post-millennials are deeply concerned about sustainability, many are still involved in overconsumption and shop at brands that are not environmentally friendly to seek their fashion and hedonic needs (Liang, Li, and Lei 2022). This is known as the Gen Z Fast-Fashion Paradox (Tyler 2022). As previously mentioned, while Gen Z consumers are the biggest generational advocates for sustainability, they still consume fast fashion. Shein, for example, has been widely criticized for its fashion waste, poor labor laws, worker exploitation, and intellectual property theft (Eley and Olcott 2021). Nonetheless, the brand's primary target market is still Gen Z consumers (Shen 2022). While post-millennials show deep values for sustainability concerns and expect brands to follow the same principles, there is still a gap between their perceptions and behavior.

#### **2.4.6 Reviews**

Post-millennials strongly value and actively look for reviews of products online before making purchases. In fact, before shopping, this cohort of consumers does a considerable amount of

research online regarding reviews and ratings of consumers who have bought and used the product (Van den Bergh and Pallini, 2018, quoted in Thangavel, Pathak and Chandra 2019). This way, they can compare the many options and weigh the benefits and disadvantages of their purchase decisions. In addition, post-millennials turn to the internet to learn about new trends and arrivals (Grigoreva, Garifova and Polovkina 2021) and rely on people on social media and online platforms to learn about shopping experiences, reviews, and customer ratings. Also, Gen Z consumers appreciate the opinions and shopping experiences of friends and relatives to help them navigate and evaluate options (Dorie and Loranger 2020, quoted in Agrawal 2022).

#### **2.4.7 Influencers**

Zoomers seek inspiration online and recommendations from influencers to help them make purchase decisions, whether that is in terms of reviews or finding new products and trends. The reality is that influencers have an important role in this cohort's buying decisions. Not only do Gen Z consumers view and look up to influencers as peers (Alves de Castro, O'Reilly, and Carthy 2021), but also, according to a Kantar study, 44% of Gen Z consumers make purchase decisions based on influencer recommendations (Pradhan et al. 2022).

Nevertheless, it is vital to mention that post-millennials seek unbiased opinions of people who have tried and used the products. For this reason, brands paying celebrities to endorse them for money is not enough to convert Gen Z consumers into buying their products, and it can even harm how these consumers perceive these brands. Therefore, Zoomers need to perceive these fashionistas as being transparent and authentic in their opinions; otherwise, their content is perceived as advertising, resulting from a paid reward (Wolf 2020). If this occurs, it may create a negative impression and skepticism toward the sponsored product, the influencer, and even the brand (Kim and Kim 2020).

Because of this, Zoomers prefer to hear the opinions, reviews and recommendations of people they look up to as trustworthy and honest. Given this, Gen Z consumers typically look for micro-influencers who live similar lifestyles and often share more wholesome moments and the good and not-so-good aspects of their lives (Wolf 2020). As a result, their content is perceived as more genuine and authentic, and Zoomers are more likely to buy the same products and follow their advice and recommendations.

## **2.5 Expectations on the Shopping Experience**

As previously discussed, most Gen Z consumers turn to online shopping as a convenient, easy, and fast method to make fashion purchases. As a result, there are a few points and things they expect from brands and their online shopping experience.

### **2.5.1 Brand, Seller, and Reputation**

Firstly, Gen Z consumers are extremely comfortable with technology. With the immense number of options, brands, and products they have available and accessible, consumers tend to be more prone to switch brands and are more demanding (Muraldihar 2019). As a result, they expect the brands and companies to meet the digital demands of this cohort. A study on the E-commerce shopping behavior of Gen Z has outlined that, when choosing to shop online, this cohort of consumers is extremely influenced by the design of the website and the reputation of the brand (Laitkep and Repkova Stofkova 2021).

Literature shows that Gen Z consumers deeply perceive these attributes as deciding aspects for making purchases online. Factors regarding the website, such as an esthetic and creative design, providing detailed and precise information about the products, and a platform that is easy to navigate and search for information, are important for this cohort. Also, a secure and private connection and the reliability of the shopping experience, which includes the indication of products available and the several means of delivery (Ayuni 2019), are essential for these

consumers. All these play a role in how Gen Z consumers perceive the value of their online shopping experience.

In addition, consumers place high importance on shopping online from a well-known seller and value the reputation of the retailer (Laitkep and Repkova Stofkova 2021). The reality is that the trustworthiness of the seller plays a big part in the purchase decision (Yarrow 2014). This leads to the next point that Gen Z consumers are extremely aware of the risks of shopping online, and for this reason, shopping at a well-known seller plays a big role regarding their privacy and security when sharing their data and making purchases. Being an extremely tech-savvy generation that values the accessibility and convenience of online shopping, Gen Z expects brands to facilitate their shopping experience with easy and secure financial transactions (Agrawal 2022). For this reason, they expect websites to provide consumers with varied electronic payment options and processes (Agrawal 2022), fast transactions that for instance, include saving information for future purchases (Wolfenbarger and Gilly 2001), and maintaining the security and privacy of these methods so Gen Z feels comfortable and secure when using their platforms (Ayuni 2019). All these factors allow post-millennial consumers to perceive websites as more reliable and, consequently, increase how they perceive the reputation of online stores.

### **2.5.2 Delivery Time**

Another important factor associated with online shopping is the delivery time of the purchased products. For instance, if shipping and mailing take longer than expected or the packages get lost during transportation, Gen Z consumers will have a negative feeling towards their shopping experience. As a result, the literature suggests that a fast, effective, and trouble-free delivery contributes to a better and more valuable shopping experience (Singh 2019, quoted in Agrawal

2022). As a result, brands should make efforts to mitigate these risks and accommodate to Gen Z's expectations of their delivery experience.

### **2.5.3 Delivery Costs**

When making purchases online, most of the time, consumers need to pay for the shipping of the items, contrary to physical stores, where consumers have immediate product availability with no shipping costs. (Wang 2021). As mentioned above Gen Z consumers are price conscious and less brand loyal than previous generations, so they are more meticulous when choosing retailers because they want to perceive some material gain when making purchases online. As a result, this generation reacts more positively and expects brands to offer them benefits such as free delivery and discounts on shipping. (Thangavel, Pathak, and Chandra 2019).

In addition, Gen Z consumers expect various types of delivery services to be available on online retail platforms (Ayuni 2019). While some consumers prefer the convenience of making purchases online and having their packages shipped directly to their houses or even paying for fast delivery, others prefer more economical options such as collecting packages at a pickup point. (Thangavel, Pathak, and Chandra 2019). Therefore, offering various methods of delivery is important to satisfy the needs and expectations of these consumers.

### **2.5.4 Return and Refund Policy**

Moreover, return policies are also of high importance for consumers of Gen Z. The reality is that, when shopping online, consumers cannot perceive the items' quality, sizes, and fit. As a result, many consumers opt to shop in physical stores, whereas making purchases online because they believe it is easier to perceive these physical attributes. For instance, the unpredictability of sizes, the inability to fully display the items, the lack of customized customer service, and the inability to touch and feel the quality of the materials of the clothes

can result in choosing the wrong apparel item. (Wang 2021). These perceived risks can result in the abandonment of shopping carts (Agrawal 2022) and create discrepancies between the consumers' expectations and their actual experience. As a result, it can create dissatisfaction and disappointment in Gen Z consumers' shopping experience.

To smooth any disparities and concerns when purchasing apparel online, consumers believe online shopping support services are vital in case concerns such as damages and other product dissatisfaction arise. For this reason, shoppers take into high consideration reliable post-purchase services such as warranty, customer support and effective and clear return and refund policies (Yarrow 2014). These measures allow to provide Gen Z consumers with a sense of security. (Nguyen Thi et al. 2022). This way, it is possible to reduce the perceived risks of online shopping among Zoomers and, as a result, allow them to have a more positive and valuable shopping experience.

### **2.5.5 Customer Ratings and Reviews**

In addition, consumers expect brands to provide their platforms with a section where shoppers can write reviews, post pictures, and publish ratings of the products they have bought. This way, consumers considering making a purchase can easily visualize the product and its quality and avoid deception between reality and their expectations. As a result, customers can gather information from authentic buyers and, therefore, make the right decision when making online purchases (Nguyen Thi et al. 2022).

### **2.5.6 Connect with Brands**

Also, it is crucial to mention that Gen Z consumers expect brands to connect with them through social media platforms. Zoomers are constantly on their phones and go online to search for information and learn about products and trends to help them make purchase decisions. As a result, they expect brands to actively engage with them and provide them with information about new arrivals and promotions on social media (Wang 2021).

## **2.6 Strategies to Reach Gen Z**

### **2.6.1 Social Media Marketing**

Social media marketing has emerged as a critical component of contemporary organizations' marketing communications. Although it is a relatively recent addition to companies' integrated marketing communications, its significance continues to grow in tandem with the digitalization surge and the ongoing expansion of social media platforms such as Instagram and TikTok (Mercadal 2023). The unparalleled capacity of social media to facilitate connections between individuals and businesses has rendered it increasingly vital for marketers in the digital era (Seema 2021).

In 2022, social media marketing surpassed other marketing channels in usage, demonstrating the diminishing relevance of traditional media, such as television and radio, particularly for younger generations (Statista 2023a). The escalating prevalence of social media usage, driven in part by its addictive nature and psychological impact on individuals, now surpasses that of cigarettes or coffee (Seema 2021). As social media's daily usage rates continue to rise, it becomes increasingly essential for brands to adapt their advertising strategies to effectively engage their target audiences (Mercadal 2023).

Social media has transcended its initial purpose, evolving into a critical facet of business operations, and presenting novel dimensions for organizational engagement (Nirschl and Laurina 2018). The utilization of social media in corporate settings has intensified, with platforms being employed strategically across various departments. Analytical tools, coupled with social media platforms, enable companies to acquire deeper insights into their target demographics, thereby facilitating the evaluation of marketing communication outcomes (Mercadal 2023).

A variety of platforms, each with distinct functionalities, are available for businesses to harness. The content shared on social media spans a broad spectrum, including promotional materials, news, general interest information, narratives, music, and more (Mercadal 2023). Gen Z exhibits a preference for platforms such as Instagram, YouTube, Snapchat, Facebook, and TikTok (Statista 2023b), each with unique applications and implications for marketing strategies. Instagram, for instance, initially emerged as a platform for sharing images and videos with friends but has since evolved into a potent marketing tool, with nearly 80% of marketers capitalizing on its capabilities for promotional purposes (Statista 2023b).

YouTube, the preeminent global online video-sharing platform, is utilized by 52% of marketers worldwide, further attesting to its popularity and reach (YouTube 2022; Statista 2023b). In contrast, Snapchat, despite ranking among the top five platforms favored by Gen Z, is employed by only 5% of companies for marketing purposes (Statista 2023b). The nature of content sharing on Snapchat, which primarily entails ephemeral images and videos accessible only for a brief duration, sets it apart from platforms like Instagram (Mazzei 2022). Additionally, Snapchat's features, such as the chat function and story feature, closely resemble those found on Instagram, thus offering limited differentiation. The platform's core design, centered on transient interactions between friends, renders it less pertinent for marketing endeavors compared to platforms with more diverse and engaging options for interaction.

Facebook, the preeminent online social network, facilitates user engagement and content sharing among its 1.93 billion daily active users worldwide (Skemp 2022). Despite its unparalleled global presence, Facebook's appeal among Gen Z is waning, as this cohort perceives the platform as catering predominantly to an older audience (Heath 2021).

Conversely, TikTok, the nascent and rapidly evolving platform, has witnessed an increase in marketing significance in recent years (Cait 2023). Initially focused on music-based content, TikTok enabled users to create short videos featuring lip-syncing to popular tracks. The platform has since expanded its scope, now encompassing a wide array of subjects encapsulated within three-to-fifteen-second video clips. The burgeoning importance of TikTok in targeting Gen Z is underscored by the extant theory-practice gap within content marketing literature that pertains specifically to this platform (Cait 2023).

Social media platforms offer an innovative avenue for brands to engage with their target audiences, presenting a cost-effective and easily coordinated alternative to traditional marketing strategies (Mercadal 2023). The primary objective for brands utilizing social media is the development and dissemination of messages aimed at connecting with their customers (Mercadal 2023). By leveraging this marketing channel, companies can reap numerous benefits, such as increased effectiveness in comparison to other marketing communication methods, enhanced brand awareness, community development, and fostering relationships with community members. Moreover, platforms like Instagram can be instrumental in improving customer service, as well as implementing campaigns with varying levels of complexity (Mercadal 2023; Schoja 2016).

An additional advantage afforded by social media marketing is a potential for brand personalization. Messages transmitted via social media often involve person-to-person communication, fostering a more trusted relationship between consumers and brands than would be possible through direct organizational communication (Mercadal 2023). The manner in which a message is conveyed is as critical as its content, with both the information and tone playing a vital role in resonating with customers (Seema 2021). Companies should employ

analytical tools provided by social media networks, such as the Meta Business Suite, to gather data on their audience and refine their messaging for specific demographic segments. By examining distinct groups of social profiles and consumer behavior, marketers can customize their messaging for heightened impact and effectiveness, ultimately leading to improved targeting and more efficient marketing communications (Mercadal 2023).

Social media marketing, facilitated by word-of-mouth and the interactive nature of social networking sites, enables businesses to derive benefits such as enhanced search engine optimization and the development of cohesive communities (Mercadal 2023). Capitalizing on these opportunities to shape public perception and messaging is crucial for businesses navigating the digital landscape.

However, the advent of new marketing communication methods also presents challenges, necessitating businesses to be cognizant of social media's limitations and risks (Schoja 2016). The multitude of platforms with diverse functionalities compels companies to judiciously select suitable platforms and acquaint themselves with the corresponding tools. This can be particularly daunting for non-experts attempting to remain current with the latest technological advancements (Mercadal 2023). Furthermore, the dynamic nature of social media interactions can pose threats to businesses. The power dynamics between consumers and brands have shifted, with consumer feedback on social media wielding greater influence than in the past. Retailers, in particular, grapple with managing negative feedback on social networks. Mitigating these risks necessitates preparedness to address all potential comments and prompt responsiveness to feedback (Schoja 2016).

Brands employing social media as a marketing communication tool must possess a thorough understanding of their target audience's preferences and expectations for content shared on

these platforms (Seema 2021). Videos, particularly short and engaging ones, have emerged as the most popular and effective content format on social media. The content consumption patterns of Gen Z indicate a shift from interpersonal connection to entertainment, suggesting that this demographic is more inclined to resonate with brands that offer entertaining content rather than purely informative material. While social media marketing remains in its nascent stage, with its future trajectory uncertain, it has begun to exhibit parallels with early television and traditional behavioral patterns (Kestenbau 2023).

### **2.6.2 Influencer Marketing**

As mentioned in the preceding chapter, social media has assumed increasing significance for businesses, particularly in engaging with Gen Z. The transition from offline to online media necessitates an evolution in marketing strategies. Digital marketing now directly impacts content marketing and recommendation marketing. Content marketing pertains to the creation of content to target specific demographics, whereas recommendation marketing involves leveraging positive customer feedback. Together, these strategies form the foundation of influencer marketing (Nirschl and Steinberg 2018).

A study by Grand View Research (n. d.) anticipates substantial growth in influencer marketing within the fashion sector between 2020 and 2027. The prominence of influencers is predicted to rise, with the market size, valued at \$1.5 billion in 2019, and expected to experience an annual growth rate of 35.7% (Grand View Research n. d.). Influencer marketing seeks to achieve traditional marketing objectives, such as providing the appropriate product, service, location, communication, and pricing to outperform competitors and ensure profitability (Levin 2020). However, the concept of influencers warrants further examination.

Influencers, also known as creators, gain prominence by sharing their lives with followers across various social media networks. Their fame is not derived from traditional mass media

or television appearances; instead, they capitalize on the digital realm to document their lives and exert tangible influence on their followers (Lou and Yuan 2019). Typically, influencers possess expertise in specific fields, such as food, fitness, makeup, or fashion, resulting in their followers representing a relatively homogenous group, which is advantageous for brands (Nirschl and Steinberg 2018).

Influencer marketing offers a novel approach for brands to connect with their target audience by compensating influencers for promoting their products or services (Boone 2020). This method resembles celebrity endorsement but boasts enhanced efficiency due to the pervasive influence of social media. The exclusive domain of celebrities as influential figures has been disrupted, as a consequence of shifting consumer behavior. Contemporary consumers seek recommendations from trusted sources, including friends, family, and influencers. Notably, Gen Z is most influenced by recommendations from family and friends, reinforcing the impact of influencers as part of these trusted circles (Statista 2023c). Marketers harness this trust to expediently and effectively reach broader audiences (Boone 2020).

Influencer marketing offers businesses numerous advantages over traditional media, including content generation, improved communication with the target audience, authenticity, extensive reach, and reduced divergence loss. While cost-effectiveness and efficiency are also benefits, they are deemed less significant (Statista 2023d).

Another compelling reason for organizations to harness the power of influencers is the increasing consumer fatigue associated with traditional advertisements (Boone 2020). Consumers are inundated with advertisements daily, resulting in desensitization and decreased receptiveness to conventional ad formats. Influencer marketing, on the other hand, can break through this barrier, as influencer-driven content is less readily perceived as advertising.

Furthermore, to effectively engage with Gen Z, businesses must employ social media marketing strategies, as discussed in Chapter 2.6.1.

Influencer marketing capitalizes on word-of-mouth promotion, utilizing individuals who have already established a strong rapport with their communities. Influencers' communities inherently trust them, rendering their recommendations more persuasive. The fashion industry, in particular, has witnessed remarkable success with influencer marketing, as demonstrated by a 2021 YouGov study (Statista 2023e). A notable example occurred in 2015 when fifty influencers featured the same dress on Instagram, leading to the item selling out within a week (Boone 2020). Influencers exert a substantial impact on consumers due to their expertise, credibility, and perceived authority in specific areas. Their strong relationships with their communities amplify their impact, and the more intimately an opinion leader knows their audience and vice versa, the more effective their influence on the target demographic. Another contributing factor to influencers' effectiveness is their vast audience reach (Levin 2020).

Despite its relatively recent emergence, influencer marketing has already undergone notable transformations. Initially, businesses focused primarily on partnering with mega influencers. However, this methodology has subsequently progressed to incorporate partnerships with micro-influencers, who may possess a comparatively humble audience yet exert a more significant influence within their respective communities. This enhanced impact can be attributed to the dissemination of more trustworthy content and the adoption of lifestyles akin to those of their followers, thereby cultivating a heightened sense of authenticity (Boone 2020). Moreover, the data obtained through social media marketing has increased in value, with analytics tools employed to manage marketing initiatives, customer experience, and competitive intelligence (Statista 2023f; Boone 2020).

A crucial challenge for businesses is the identification of suitable influencers for their target audience. For example, cybersecurity company Cheq has revealed that fraudulent influencers cost businesses over 1 billion US dollars annually (Boone 2020). To mitigate this risk, organizations must thoroughly understand how to effectively engage in influencer marketing. The initial step in influencer marketing involves defining marketing objectives, target audience, and success criteria. Potential goals for influencer marketing campaigns include generating brand awareness, fostering consideration, promoting action, or driving production. If the primary aim is to increase brand awareness, strategic KPIs such as reach should be prioritized, with Instagram being a popular platform for this purpose. If the focus is on consideration, brands should consider metrics like total engagement and cost per view. Conversion-oriented campaigns, which aim to encourage specific actions such as purchases, often utilize platforms like YouTube and Instagram. Regardless of the goal, it is essential to adopt a S.M.A.R.T. approach to defining objectives (Levin 2020).

The rapid pace of the internet allows businesses to act and react swiftly, enhancing their flexibility and adaptability. As the internet gradually supplants traditional media forms like television and radio, it is anticipated that younger target audiences, such as Gen Z, will become predominantly accessible via social media (Jahnke 2018).

### **2.6.3 Social Commerce**

Social commerce represents the intersection of E-commerce, E-marketing, social media, and technology (Boardman et al. 2019). In the literature, social commerce is understood in two ways: E-commerce on social media sites or the incorporation of social media features on E-commerce sites (Boardman et al. 2019). Fundamentally, social commerce is rooted in social media and Web 2.0, which provide new business distribution channels and foster connections between brands and their customers (Lin, Li, and Wang 2017). First introduced by Yahoo in

2005, the significance of social commerce for companies has grown consistently over time (Huang and Yeap 2022).

Companies employ social commerce to sell products directly to consumers through social media networks such as Instagram and Facebook, making it increasingly vital for digital marketing due to ongoing digitalization and the proliferation of social media (Mohn 2020). Recognizing the value of a more social, creative, and collaborative approach, marketers have increasingly integrated social commerce into their daily business operations (Huang and Yeap 2022).

Various approaches can be adopted for implementing social commerce, including the utilization of commenting features, advertising, direct selling of products on social media platforms, and sharing and promoting discounts or coupons (Mohn 2020). Social commerce primarily aims to establish connections with customers and facilitate communication between companies and their target audience. The advantages that companies and brands derive from social media, as discussed in Chapter 2.6.1. are further augmented by social commerce, which enhances their capabilities (Lin, Li, and Wang 2017). By engaging with consumers, companies can receive continuous feedback, opinions, and suggestions, leading to a more innovative approach within the organization (Lin, Li, and Wang 2017).

As elucidated in Chapter 2.6.1. social media platforms serve as effective tools for companies to engage with their customers. Consequently, it is imperative for companies to carefully select the appropriate platform. Various platforms, such as Instagram and Facebook, offer distinct features that marketers can leverage in diverse ways (Boardman et al. 2019). For successful social commerce, it is crucial to utilize a platform that facilitates numerous interaction opportunities and enables users to generate user-generated content (UGC) (Mohn 2020).

UGC, an integral component of social commerce, encompasses content created by consumers, including feedback acquired through comments, posts, likes, or reviews (Mohn 2020; Almahameed and Obidat 2023). The interaction among users on social platforms generates valuable feedback for brands and raises awareness, ultimately leading to increased sales (Mohn 2020). Consumers already employ social media for daily communication with friends, which provides a significant advantage for social commerce. Users of social networks are inherently predisposed to sharing, recommending, and reviewing products or services, eliminating the need for external encouragement (Huang and Yeap 2022). Nevertheless, social commerce should be viewed as a tool for obtaining feedback and creating value through content. Industries such as fashion particularly benefit from two-way exchanges on social networks between brands and customers, or among customers themselves (Molina-Peados, Muñoz-Leiva, and Prados-Peña 2021).

The intentional promotion of dialogue between customers and brands gives rise to a new power dynamic between the brand and the consumer. While commercial activity tactics were once exclusively controlled by sellers, consumers have now acquired bargaining power (Almahameed and Obidat 2023).

Social commerce holds particular appeal for Gen Z, as this demographic has grown up with these media platforms and incorporates them into their daily lives (see Chapter 2.3). This generation is accustomed to frequently engaging with friends and family, exchanging ideas and opinions, with social media serving as the primary medium for such interactions (Boardman et al. 2019). The importance of connecting with family and friends for Gen Z has led to the growing significance of influencers. As discussed in Chapter 2.4.7, influencers wield considerable influence over their communities.

Some of the advantages of influencer marketing are also harnessed within the realm of social commerce. The sense of community fosters an environment that facilitates consumers' decision-making processes (Boardman et al. 2019). Through the integration of social commerce, social media, and influencer marketing, businesses can gain a deeper understanding of their consumers, subsequently refining their strategies to effectively reach, engage, and establish connections with them (Molina-Peados, Muñoz-Leiva, and Prados-Peña 2021).

The COVID-19 pandemic has significantly bolstered the prominence of social commerce. With extended store closures and frequent lockdowns, consumers have increasingly turned to online shopping as their primary means of purchasing goods. Moreover, individuals have spent considerably more time on social networks, further emphasizing the importance of this marketing channel (Huang and Yeap 2022). The demand for social commerce is expected to persist even after the pandemic, necessitating that businesses adapt their strategies to accommodate evolving customer needs (Molina-Peados, Muñoz-Leiva, and Prados-Peña 2021).

The full potential of social commerce has yet to be realized, both from the perspective of the platforms facilitating it and the consumers whose demand continues to grow (Boardman et. al., 2019). Social networks, such as Instagram, are developing new features to support social commerce; for example, Instagram introduced the "Shop Now" feature in March 2018, and Snapchat provided the "Shoppable Augmented Reality" feature in 2018, which allowed customers to virtually try on jewelry within the app. The future of social commerce will be significantly influenced by advancements in artificial intelligence (AI) and technological innovations in the coming years (Boardman et al. 2019; Mohn 2020).

## 3 Data and Methodology

### 3.1 Consumer Interviews

#### 3.1.1 Consumer Interview Methodology

Qualitative consumer interviews were conducted to ensure access to valuable primary data because they are considered “one of the most trustworthy and effective sources of consumer data” (Arsel 2017, 939). The objective of conducting interviews was to gain an initial understanding of the subject and what attributes Gen Z values.

The interviews were designed utilizing the 4-step guide of Zeynep Arsel, which is subdivided into (i) “settling with an epistemological tradition”, (ii) “preparing the interview protocol”, (iii) “conducting the interview”, and (iv) “iterate” (2017, 940-946).

They were chosen to follow a phenomenological approach, which focuses on lived experiences of individuals, thus providing insights into their shopping experience (Thompson 1997). Two specific interview protocols were developed – for online shoppers and offline shoppers. To ensure a seamless interview experience and assist with the analysis, the questions were matched to one of the following five categories: usage, attributes, preferences, improvement points, and demographics (see Table 1 and Table 2). Following an initial draft for the scripts, the scripts were tested for comprehensibility through mock interviews. Upon finalization of the scripts, ten interviews were conducted in person and digitally via Teams and Zoom.

#### 3.1.2 Consumer Interview Data

The analysis of the surveys followed the previously mentioned five categories. Looking at the *Demographics*, the researchers saw that all participants were born between 1997 and 2000, thus belonging to Gen Z. The mean age across the sample is 23.4, with 80% being female and 20% male, out of which the majority (70%) studies full-time (see Table 3).

Regarding *Usage*, 80% of the interviewees consider themselves online shoppers, and only two preferred in-store. When asked about the reasoning, both mentioned that they were concerned

about items not fitting. The frequency of how often participants shopped fashion online heavily differed, ranging from biweekly to 3 times a year. Additionally, 80% of the participants bought a jacket online, providing an ideal basis for further analysis. In total, 19 unique online shops were mentioned, from which the participants buy, with ASOS and Zara being the preferred choices (mentioned by half), followed by Mango and H&M (see Table 4).

In the category *Attributes*, those relating to the interviewee's motivation to shop online (e.g., delivery, return) and features/qualities linked to the jacket itself (e.g., price, fabric, style) were considered. The most critical factors for online shopping were convenience, a more extensive product range, price, and a better overview. Regarding features and qualities, the price was mentioned the most (7), and quality averaged the highest (1.4). Other factors included material, model, suitability for the season & jacket type (see Table 5 to Table 8).

The category *Preferences* provided insights into why consumers preferred shops over others. ASOS (4) and Zara (2) were the most mentioned shops, followed by Shein, Zalando, Mango, and Instagram Shops (1 each). Furthermore, 40% tend to buy from their preferred shop when they buy fashion (identical frequency general shopping frequency and frequency at preferred one, see Table 9) – a potential indicator for high brand loyalty or superior offering. The reasons for preferring a shop were mapped across six dimensions, with the offering (13 factors mentioned) being the most important, followed by pricing (6), shipping (3), return policy (2), membership/loyalty programs (2), and platform-specific features (2) (see Table 10).

Regarding *Improvement-Points*, the researchers saw that there is still improvement room, with interviewees ranking their most recent shopping experience as 7.9 on average with a standard deviation of 1.87. Issues consumers face include products being mixed up, quality issues, products not fitting, products looking different in-person, delivery issues, and having to pay customs. The question on dealbreakers in shopping online revealed that expensive shipping,

bad return policies, slow shipping, bad digital presentation, and a too-high price must be addressed. Areas for improvement, on the other hand, are pricing and discounts (more coupons, e.g., for newsletter signup), digital presentation of the product (360° videos and detailed size description), advertising and communication (more transparent communication and more influencers), as well as delivery.

## **3.2 Perceptual Map**

### **3.2.1 Methodology**

The best method to comprehend the brand image of a particular brand or product is to collect information about consumers' perceptions of the topic of study, for instance, by conducting a survey. However, the issue of how to organize the collected data and feedback is recurrent. Therefore, one of the potential solutions to this issue is to use a perceptual map to make it simpler to visualize consumer perceptions (William 2023).

Therefore, a perceptual map can be created to comprehend how consumers perceive and feel about a particular brand or product. Theoretically, a perceptual map is a statistical technique known as multidimensional scaling that creates a multidimensional image of the perceived similarities and differences between brands (Gigauri 2019). They are helpful charts that enable companies to understand the competitive positioning of their brand or product. In addition, they allow companies to compare vital attributes with consumers, and are frequently used in market research to comprehend consumers' reactions to key attributes and benefits of competitive products or brands. (Gigauri 2019) Perceptual mapping is a tool that allows market researchers to visualize consumer perceptions of product attributes, brands, and services, among other things. (Gigauri 2019).

According to William (2023), five straightforward stages are required to create a perceptual map:

Initially, researchers must select the attributes. This selection should be based on the target audience and the attributes consumers use to compare the products or the brand to the competition. Given the diversity of the target market, it may be beneficial to determine which are the most essential from a typical customer's perspective.

Next comes the most crucial component of perceptual map construction, setting dimensions. This stage will enable the researchers to clearly interpret the customer's perceptions, which

involves assigning numerical values to each axis and considering that a more significant number of numerical values indicates a superior mapping. Therefore, it is mandatory to determine the product attributes and brands to map. This stage is essential for increasing the map's efficacy. For instance, if the goal is to create a map for jackets, a variety of brands should be selected, depending on the information the researcher wish to obtain.

The fourth step is to conduct a survey. The best way to collect data for the perceptual map is through surveys, where questions should be asked in the Likert Scale format – a five or sometimes seven-point scale that allows respondents to indicate the degree to which they agree or disagree with a particular statement by providing five or seven possible responses. Examples include (1) Strongly Disagree; (2) Disagree; (3) Undecided; (4) Agree; and (5) Strongly Agree (McLeod 2023).

After the previous steps have been completed, this final step is likely the simplest, to create the actual map. A typical perceptual map appears as a graph with two dimensions represented as the X and Y axes, where both dimensions should measure attributes or dimensions that consumers actively consider when making an actual purchase (William 2023).

Nonetheless, it is essential to be aware that there are two significant categories of perceptual maps: standard and multi-dimensional.

The multidimensional perception may provide a more comprehensive view of an entire product market, by integrating customer perspectives on at least three attributes. (Indeed Editorial Team 2022). The first employs a two-axis chart structure, so that it can be used to analyze perceptions of two product attributes (William 2023; Indeed Editorial Team 2022). Due to the complexity of this form of perceptual mapping, statistical tools are required (William 2023; Indeed Editorial Team 2022), such as IBM SPSS, which is one of the most popular software programs

In the case of multidimensional perceptual maps, the creation process will differ slightly, as dimensions will be condensed by a statistical transformation tool in order to fit them on a traditional axis-based perceptual map (Zheng 2011). This implies that the final stage is to generate a multidimensional scaling (Zheng 2011) to obtain the multidimensional perceptual map, as opposed to manually positioning brands or attributes based on the dimensions chosen. After accumulating information, a researcher must analyze the results in order to draw conclusions that can be used to formulate recommendations and provide insights.

### **3.2.2 Survey Construction**

The researchers decided to conduct a perceptual map in order to analyze and answer the first and second research questions, “ How does Gen Z behave when purchasing jackets online?“ ” What do consumers expect from fashion brands in their shopping experience?“. After the consumers interviews, the researchers constructed this quantitative analysis. The online survey was compiled using Google forms and was available for seven days. To control any sampling error, the professor advisor and two others were asked to assess and ensure the clarity of the text.

The survey was launched on different channels, considering the easier access to get a voluntary response sampling from the generation in question. The platforms were the following ones: LinkedIn, Facebook, Instagram, and WhatsApp. The questionnaire was launched both on personal social media accounts (Instagram, Facebook, Reddit and LinkedIn) as well as on family and friends’ groups (WhatsApp).

The questionnaire included a total of 16 questions, which were separated into three sections (see Table 11). The first question assessed whether respondents are members of Gen Z. Negative responses to the preceding question determined exclusion from the survey. This section was used to determine whether respondents belonged to Gen Z and whether they were actual jacket consumers with a certain level of brand knowledge. Entries that answered “no”

were eliminated because there was insufficient data to analyze them. Later, all the textual data pertaining to the associations were converted to numeric form.

The second section consisted of fundamental perceptual questions, each of which inquired about the consumer's perception of a specific attribute and characteristic of various brands. These eleven questions were constructed using the attribute rating method known as the Likert scale. Respondents were asked to select a number between one and five, with one representing "Extremely unimportant" and five representing "Extremely important." The objective of the Likert scale was to gauge the consumers' perceptions of each examined brand (Zara, Mango, Shein, ASOS, and H&M). Participants were required to select a number based on the scale at the bottom of each question. The characteristics examined were the following ones: (i) brand reputation, (ii) product price, (iii) discounts, (iv) quality of materials, (v) design, (vi) uniqueness, (vii) sustainability of materials, (viii) gender association, (ix) shipping costs, (x) delivery time, (xi) return policy. In order to access the third part of the survey, consumers were asked to give feedback to all the sections of brands under examination.

Finally, the last part of the questionnaire included demographic questions to collect data on the questionnaire sample characteristics. The descriptors used were (i) frequency of purchases, (ii) channels, (iii) influencers, (iv) inspiration, (v) preferences, (vi) motivations to shop in-store, (vii) gender, (viii) age, (ix) education level, (x) professional status, (xi) income, and (xii) country. All the questions were multiple choice except the third and the fourth that contained a 5-points Likert scale where each influencer or source of inspiration was supposed to be rated. The questionnaire was organized as depicted in Table 11. After conducting the survey, descriptive statistical outputs were available, allowing the researchers to characterize the sample. To conduct the analysis of the collected data, the average responses of all respondents were calculated for each attribute to determine how participants viewed each brand. In addition, with the aid of IBM SPSS software, a factor analysis was performed on the questionnaire data

to transform a number of variables into smaller categories and then construct the perceptual maps.

The final stages of the process involved the analysis of the data and the subsequent development of the perceptual map. It is essential to note that both will be investigated in the results component of this study.

The questionnaire was anonymous and available online for one week, eliciting 232 responses in an average of five minutes per response.

### **3.3 Conjoint Analysis**

#### **3.3.1 Methodology**

The theory concerning conjoint analysis was first established in 1964 by Luce and Tukey; however, initially, it only considered the impact of two attributes (Luce and Tukey 1964). Three years later, Tversky presented the “polynomial conjoint measurement”, which, unlike Luce & Tukey’s model, considers more than two attributes (Tversky 1967, 1) and delivers the basis for conjoint analysis in the context of marketing.

The objective of conjoint analysis is to discover the effect of several variables on a dependent variable, the preference for a product, such as a jacket in this work (Green and Rao 1971, 355). Within the scope of this work, the choice-based conjoint analysis was applied, which according to Rao, is “probably the most widely used method currently” (Rao 2014, 6). This approach originates from McFadden’s random utility maximization concept, which helps to understand how individuals make decisions (McFadden 1973).

To design the conjoint study, the approach formulated by Rao (2014) was selected, which starts with defining the problem, which in the scope of this work is to understand how tradeoffs are made by Gen-Z when shopping online for fashion and which attributes are most relevant. The second step then involves selecting the features and levels to build the profiles for potential products displayed to the survey participant. In the case of this work, the features and levels were selected based on the preliminary interviews and market research. Thirdly the researcher must construct the survey to be distributed. After collecting the information, one must analyze the results to draw conclusions that can be used to provide recommendations and insights.

#### **3.3.2 Survey Construction**

The survey was constructed using “Conjointly”, which is a platform dedicated to setting up and running surveys, as well as assisting the user throughout the process with the analysis. Conjointly allows running various marketing-related experiments (“surveys” in the following),

including the generic conjoint analysis used within this work. Upon launching a new survey, the user first must assign the attributes to be tested and their respective. Generally, it is recommended by the platform not to use more than seven product attributes. The reason behind this recommendation is that including a higher number of features will lead to an increased cognitive burden for the respondents (Conjointly n.d.). In terms of levels, each attribute should have at least two levels to test a distinctive set of features. The researchers, however, decided to include eight attributes to try a broader range of attributes and their respective levels (2-8) without making it too hard for the participant to consider all factors.

The first chosen attribute constitutes the *Online Retailer* from which the consumer buys their jacket. While it would also be feasible to include the manufacturer of the brand, the researchers saw in the analysis of the interviews that this was only relevant to one respondent and that a substantial amount of the interviewees typically buy at the same store repeatedly. The selection of the online shops was based on three factors which are (i) popularity in the preliminary interviews, (ii) global brand popularity, and (iii) social media activity. Based on the established criteria, ASOS, Zara, Mango, Shein, and H&M were selected (for the rationale behind the inclusion of each respective brand, see Table 12).

The second attribute is the *Jacket Style*, which can be classified via various criteria. One can classify jackets based on the elements it has (shell, lining...), the materials used (cotton, leather...), and different models (rain jacket, bomber jacket...). Ultimately material was used to classify the jacket style considering it was also deemed an essential factor in the preliminary interviews. Due to the impact of the material on the jacket's shape, purpose, and comfortability, all common materials, according to Masterclass, were included with some minor adaptations (2021). Cotton, leather, fleece, and polyester were all adopted as levels. Shearling was considered under wool due to the similarities to limit the options. Additionally, synthetic leather (leatherette) was considered due to the wide range of synthetic leather jackets being offered

and them being more affordable. On the other hand, affordability led to the decision to exclude cashmere, as cashmere jackets come with much higher price tags which would likely skew the analysis due to the price sensitivity of early-career professionals/students.

Thirdly *Jacket Color* was included, as the interviews have showcased that color is an important feature (some look only for a specific color). In this case, jacket color refers to the primary color of the jacket. For the levels, researchers decided to use color palettes that are commonly seen, which include: brown, black, white, blue, and green shades.

*Durability* was considered a proxy for quality, which was considered very important in the interviews. This proxy is used as terms such as “very bad”, “bad”, “moderate”, “good” etc. are judgmental and could create a bias. When considering the lifespan of jackets, the minimum lifespan per jacket type can range from as little as two years to ten years. Therefore, various lifespans within this range were considered (Outlifeexpert n.d.).

Considering the importance of *Delivery* (reason to shop online and improvement point), various delivery options are tested, differing in speed and sustainability.

Due to *Return Policy* concerns, this attribute was selected as the seventh attribute. The researchers also saw that those who pointed out that they still prefer brick-and-mortar stores and only shop occasionally online were mainly concerned with the return process. A better return process could also be necessary, not only for online shoppers but especially for those who still do in-store shopping, to persuade them to buy more online.

*Price* was included as the last factor, as it was considered an important factor and essential for conjoint analysis. The price levels were established by comparing the current jacket portfolios of the selected online retailers (see Table 13). Based on the findings, a price ceiling of 300€ and a price floor of 30€ were established, with various levels in between. The researchers additionally worked with prohibited pairs concerning the price. Firstly, prices of 250€ and 300€ are prohibited from being associated with Shein, as Shein has no products anywhere close to

this price range. Additionally, the material “authentic leather” cannot be matched with 30€ considering the high material prices, as this would lead to unfeasible options from a financial perspective.

The researchers also allowed the participants to choose none of the three options provided at once. The rationale is that the researchers want to avoid forcing the participants to choose options they would never consider buying, as this could lead to arbitrary responses.

## **4 Results**

In the following the findings within the conjoint analysis and perceptual map will be provided, addressing the questions on which attributes are important in summer jackets and how brands are perceived.

### **4.1 Perceptual Maps**

#### **4.1.1 Sample Characteristics**

For the purpose of collecting samples, the survey was sent out between April 1st and April 8th. It was promoted on Facebook, Instagram, WhatsApp, and LinkedIn, among others. The link was sent one thousand times, of which 768 (76.8%) did not begin the survey, one did not finish it and 231 (23.1%) completed it (see Table 14).

The launched survey yielded a total of 231 responses, of which 231 were from Gen Z.

Furthermore, 99.57% (230) of the 231 knew at least one of the brands, while 0.43% (1) did not. 93.48% (215) of the 230 have purchased at least one of these brands, while 6.52% have not. Considering that the purpose of this investigation was to examine the online purchasing of certain brands, only 215 of the collected answers were considered, representing 92.67% of the total responses (see Figure 2 to Figure 4).

To better characterize the sample, demographic information was requested: age, country, gender, educational levels, occupation, and monthly liquid income. Due to the survey's emphasis on online shopping, it is essential to investigate the additional characteristics of the respondents' profiles. Thus, the researchers examined the participants' online shopping frequency, channels, influencers, inspiration, preferences, and in-store purchasing motivations. Hence, the evaluation of these responses was essential to this research, as it had the potential to influence the report's conclusions. Based on the respondents' demographic responses, the compiled sample can be characterized.

Regarding demographics, the researchers found that 44% of respondents were born in the 20th century, while only 17.8 % were born after 2004 (see Figure 5). The researchers anticipated this left-sided distribution because younger members of Gen Z frequently lack the means to purchase for themselves. The observers can see that the number of answers to our survey varies proportionally to the age of the individuals; the younger the individual, the fewer responses researchers have, and vice versa.

The majority of respondents are German (61.04%), followed by Portuguese (29.54%) and Brazilians (2.60%) (see Table 15).

According to the questionnaire results and the statistical analysis of all variables that characterize demographics, it was possible to conclude that the number of females and males in this study is identical. Among the 215 responses considered, 109 (50.7%) are female, and 94 (43.72%) are male. The remaining six individuals (2.79%) responded with "others," and six individuals (2.79%) chose not to disclose their gender association (see Table 16).

Following the analysis, the educational background of the population considered for the research reveals that out of 215 cases, only one individual (0.47%) did an MBA/Ph.D. Given that researchers are studying Gen Z, this result was already anticipated. In the following scale of the hierarchy, it was also possible to identify that 13.49% of the respondents have obtained their master's degree, 40% have received their bachelor's degree, 35.5% have a high school diploma, and 10.70% have not yet completed high school (see Table 17).

Concerning the employment status of the survey's sample, researchers can see that there is a marked inclination toward students, with a total of 170 individuals (79.07%) out of the total 215. Next, and descending, as seen in Table 18, it is possible to identify the group representing full-time employees with a total of 30 individuals (13.95%). This group constitutes the most significant proportion of all respondents, which is natural given the focus on Gen Z. Lastly, the

group of part-time workers consists of 9 individuals (4.19%). Only 2.79 % of the participants do not belong to any of the categories mentioned above.

In terms of monthly liquid income (salary minus deductions), more than half of the participants have received less than 1000€ (64.65%). On the other hand, only 13.03% have more than 2000€ available per month, which is an effect of the correlation between birth year, monthly income, and professional status (see Figure 6).

In terms of Online Shopping Frequency, the researchers found that more than 50% of respondents shop frequently (once every 1 to 3 months or more often) online, with nearly half (43.72%) indicating that they shop once every one to three months (see Figure 7).

Regarding online shopping channels, retailer websites (e.g., Nordstrom, Zara) account for 73.16 % of all transactions. Followed by Online marketplaces (e.g., Amazon, eBay) and Fashion-specific marketplaces (e.g., ASOS, Farfetch), scoring 44.59% and 42.42%, respectively. The lowest score goes to social media shopping (e.g., Instagram, Facebook) (19.91%) and Outlet store websites (e.g., Saks Off 5th, Nordstrom Rack) scoring 11.69% (see Figure 8).

According to the results of the questionnaire, and after performing the statistical analysis of each of the variables, it was possible to conclude that those who influenced the most before buying clothes were friends with the highest score, family influencers, and in the last place, celebrities (see Figure 9).

In terms of inspiration, it was possible to determine that the majority of consumers find inspiration on Instagram, followed by TikTok, Pinterest, and radio/television. Additionally, we can conclude that consumers rarely find inspiration on Facebook (see Figure 10).

Continuing the analysis of the questionnaire results, it was possible to determine that 90.23% of the population considered for the study purchases in-store and online. In the following

hierarchy, 5.58% of customers only shop online, while 4.19% only shop in-store (see Figure 11).

Concerning why consumers choose to shop in-store, the primary reasons are the predictability of fit/sizes, the ease of determining product quality, and immediate product availability, with scores of 92.56%, 80.47%, and 73.49%, respectively. Next, and descending, it is possible to identify the cause of social experiences such as purchasing with friends, with a total of 34.88%. Lastly, Personal Customer Service represents a lesser proportion of the sample, with 14.42%. 4.65% do not shop in-store (see Figure 12).

When it comes to Brand Awareness, H&M, and Zara have the highest brand awareness across the sample, scoring 98.70% and 96.96%, respectively, followed by Shein (84.22%), Mango (77.83%) and ASOS (68.70%). Only 0.43% of respondents were unfamiliar with any of the brands mentioned (see Figure 13).

Even though both H&M and Zara have widespread brand recognition, there is a significant difference between the proportion of respondents who have purchased from each brand. As opposed to Zara's 68.37%, 93.02% of those familiar with H&M have also purchased H&M. Even though Shein has the third highest brand recognition, only 33.02% of those familiar with the brand have purchased from the store. Mango (46.51%) performed better than Shein (32.56%), and ASOS (32.56%) performed the worst (see Figure 14).

#### **4.1.2 Perceptual Map's Analysis**

To generate a concrete analysis from the qualitative, a perceptual map was constructed using the statistical software SPSS. The dimensions of the attributes were then diminished by linearly combining the original variables and the solutions to each principal component (Arkkelin 2014).

As mentioned previously, this questionnaire uses a Likert-type scale so that respondents can rank eleven attributes on a five-point scale, where one corresponds to "extremely unimportant,"

three is "neutral," and five is "extremely important." According to Croasmun and Ostrom (2011), likert scales are beneficial in social science and attitude research initiatives.

The analysis's main objective was to build a perceptual map using SPSS factor analysis. A factor analysis aims to group similar variables into dimensions and reduce the number of variables in a regression model to facilitate data interpretation. Nonetheless, it is essential to observe that this technique assumes the input characteristics are linearly related. This suggests that factor analysis may not perform well on sets of features that are not linearly related, and that it cannot generate meaningful results in situations where none of the input features are correlated. If no features contain comparable information, this is not feasible. (Ellis 2022).

It is necessary to construct the perceptual map by reducing all the variables used in the preliminary questionnaire into components that attempt to explain those variables most thoroughly. As evidenced by the Scree Plot with two explanatory components (see Figure 15), two components explain many of the study variables.

The Table 19 was created to illustrate the variance and cumulative variances explained by each dimension. Two dimensions will be considered for this investigation. The rationale behind the selection of the number of dimensions corresponds to the method employed. A dimension is only deemed significant if its associated scalars (eigenvalues) are greater than 1 (Rahn, 2022). As shown in Figure 15, the eigenvalue corresponding to component number 2 is approximately  $4.7 > 1$ .

Therefore, it is possible to demonstrate that the cumulative variance of this study is justified by the selected two-dimensional model, which accounts for 92.91%. A minor amount (7.09%) remained inexplicable, indicating that the selected factors did not support the model (see Table 19) When the cumulative variance is divided into partial aggregates, the first-dimension accounts for 50.57% while the second dimension accounts for the remaining 42.33%.

Consequently, a scatter graph representing the aforementioned dimensions was generated. As shown in Figure 16, Dimension 1 is represented by the X-axis and Dimension 2 by the Y-axis. To gain a deeper understanding of the scatterplot, specifically the correlations between variables and factors, the factor loadings are analyzed to determine which component has the most significant influence on each variable. Loadings closer to -1 or 1 indicate that the factor significantly influences the variable. In contrast, variables and loadings closer to zero indicate that the factor has minimal impact on the variable (DeCoster, 1998). As an alternative to analyzing the factor loadings table, it is possible to observe the proximity of the vectors to the axis, where it is evident that there are four-dimensional groups, as shown in Figure 16. These will be labeled with the Roman numerals I, II, III, and IV, starting in the upper-right quadrant and proceeding counterclockwise.

Furthermore, by looking carefully at the four groups: shipping cost, delivery time, and return policy are positioned in the I quadrant, sustainability, design, and gender association, in the II quadrant, brand reputation in the III quadrant, and price and discounts in the IV quadrant. Even though the quality of materials and uniqueness are not as positively correlated as the other variables, the researchers can still include this attribute in the second group since it follows the same direction as the rest of the aggregated variables.

These groups fall into four distinct areas of perception characteristics. The first set prioritizes attainability. In the I quadrant, the attributes address the primary consumer concerns when ordering online; the shipping cost and delivery time attributes are related to product delivery, and the return policy attribute is related to terms and conditions. The second category corresponds to a product's characteristics. The third collects status- and performance-related attributes, based on how well a product or service performs, the fourth category relates to money.

Previously, it was possible to position each attribute on the perceptual map generated by SPSS. The X-axis and Y-axis showed two dimensions, thereby identifying groups of attributes with similar orientations. Given that the primary purpose of this data collection was to understand consumers' perceptions of brands that sell jackets, it is now important to determine how brands are positioned along these attributes.

Moving onto Figure 17, the aspect being analyzed is the position of the five brands in the Cartesian plane, which will serve as a function of dividing the four sections into quadrants. If the studied brands share a similar position in the plot, they are perceived to have similar profiles.

As it is possible to notice through their allocations, the brands can be divided into two groups: Mango and Zara in the I quadrant and H&M, ASOS, and Shein in the IV quadrant.

The fact that Zara and Mango are in the same quadrant and are relatively near indicates that they are readily comparable. This aspect suggests that the brands are perceived to possess comparable qualities, thus indirectly increasing competition between them. On the other hand, as per H&M, ASOS, and Shein, their profiles are close, which means they have similar characteristics. Lastly, when analyzing the perceptual map graphs, it is essential to note the proximity of Shein and ASOS, which suggests that the two brands likely share the same positioning.

In addition, the spaces between the brands represent an opportunity, as no other brand is perceived to offer the same combination of specific benefits and products.

Figure 18 will combine the previous Figure 17, which depicted the positioning of the brands, with the positions corresponding to the eleven predetermined attributes used to evaluate the brands, Figure 16. We can then interpret the graph based on the vectors' lengths and directions.

Regarding brand perception analysis, it is essential to note that the association between a brand and an attribute depends on the quadrant in which the brand is located (see Figure 18). Given the similar directions described by these clusters, it is possible to identify positive correlations between the considered attributes. This means that if one of them is given a high rating, a similar rating can be anticipated for the others in the group. In this case, a high rate in discounts will implicitly cause a high rate in price, and vice versa; the same logic can be applied to the other clusters.

An additional consideration is that if the orientations of the attributes are opposite, then the attributes are negatively correlated. This suggests that a high rate in one attribute is negatively related to the contrary attribute and vice versa. In this instance, such a phenomenon is observable because an opposite vector is depicted. This is evident, for instance, in the uniqueness and discounts. It indicates that a high discount rate is negatively associated with uniqueness and vice versa.

Moreover, if the directions are perpendicular to one another, this indicates that the attributes are uncorrelated. As an illustration, consider the following grouping: Uniqueness - Shipping Time; Material Quality - Shipping Cost. This observation has the practical implication that uniqueness has no effect on delivery time. Similarly, material quality has no effect on the shipping cost.

In addition, the angles of the vectors indicate a concurrence in consumers' perceptions, implying that brands associated with one characteristic will also be associated with another in a similar orientation. In this circumstance, it is conceivable to combine, for instance, price and discounts.

Moreover, the higher the value attributed to this factor, the greater the attribute's ability to differentiate between brands under consideration. In reality, the attributes with the most extended vectors are uniqueness, material quality, price, and discounts. In contrast, the

attributes with the shortest vectors are design, sustainability, and gender association, so it is possible to draw the appropriate conclusion.

Following this review, the merged analysis of the attributes and platforms based on their positions on the plane can be conducted. Beginning with Mango and Zara, as indicated previously, they share identical profile characteristics. Their location can be explained by associating them with a high importance for consumers to have a prominent level of consumer protection, quick delivery, and the ability to easily return items. These two brands should offer high consumer protection and an easy return policy, in order to succeed. Interestingly, the other three platforms, H&M, ASOS, and Shein, prices and discounts are the attributes that consumers value the most when purchasing these brands.

A further evaluation involved ranking the eleven attributes of each brand so that the locations they encompass on the map can be described in greater detail. The method involves establishing a hypothetical perpendicular line on each attribute line and moving it from the plane's exterior (i.e., the origin) inwards. The association's intensity will depend on the raking height, so the higher it is, the stronger it will be.

For instance, ASOS ranks high in price and discounts. Shein is the second closest to ASOS, and H&M is the third in all these previously stated attributes.

## 4.2 Conjoint Analysis

### 4.2.1 Sample Characteristics

The survey was shared between the 27<sup>th</sup> of March and the 5<sup>th</sup> of April and promoted on social media platforms such as Twitter, Facebook, Instagram, WhatsApp, LinkedIn, and Reddit. It was accessed 1,081 times, of which 735 (68%) did not start the survey and 322 (29.8%) successful completions. The remaining 24 answers were not included in the analysis due to low-quality responses or repeat accesses (see Table 22).

Firstly, McFadden's pseudo- $R^2$  was considered to determine the goodness of fit, as it directly affects the quality of conclusions that can be drawn. In the survey, the measure assumed a value of 69.4%, indicating that 69.4% of the variation can be explained through the model. This shows that consumers follow a relatively clear rationale when making decisions. The in subChapter 3.3.2 mentioned option to pick none of the choices provided was used 24.4% of the time indicating that consumers have specific features in mind that they look for in jackets. Regarding *Demographics*, the researchers noted that 50% were born in the 20th century, and only 5.3% were born after 2004 (see Figure 19). The researchers anticipated this left-sided distribution, considering that younger individuals often do not have the means to shop themselves. Due to an error within the platform's country tracking, the origin of the participants is only available for 49.1% (158) of the respondents. However, the other half likely follows a similar distribution based on the platforms on which the surveys were shared. Most of the respondents are German (74.1%), with Indonesian and Portuguese (7.6% each) being the second most popular nationalities (see Table 23). 35.4% noted that they identify as male, 60.9% as female, 2.5% as others, and 1.2% preferred not to disclose their gender association. The educational breakdown of the survey shows that 31.7% of the respondents have obtained their high school diploma, 48.4% have received their bachelor's degree, and 16.8% have their master's degree. Only 2.2% of the participants answered that they still needed to complete high

school; on the other hand, the researchers saw that three participants (0.9%) had already obtained an MBA or PhD.

Considering the Gen Z focus, it is natural that a high proportion still consists of students (69.9%), with a large portion (21.4%) being employed full-time and 6.5% working part-time. Only 2.2% of the participants do not fall into one of the previously mentioned categories. Regarding monthly liquid income (salary minus deductions), more than half of the participants have received less than 1,000€. On the other hand, only 15.3% have more than 2,000€ available per month, which is an effect of the correlation between birth year, monthly income, and professional status (see Figure 20).

In the second block of questions, the researchers also wanted to determine whether the collected sample was appropriate for the research scope. Considering the survey's focus on online shopping, the researchers looked at the participant's online shopping frequency, brand awareness, and whether they bought from one of the brands.

Regarding *Online Shopping Frequency*, the researchers saw that more than 50% shop rather frequently (once every 1 to 3 months or more often) online, with nearly half mentioning that they shop once every 1 to 3 months. Considering a 95% confidence interval, the researchers concluded that 45.4% - 70.1% of the actual population shops at least once every 1 to 3 months online, 7.4% - 19.0% even go as far as shopping online more than once a month (see Table 24). When it comes to *Brand Awareness*, H&M and Zara have the highest brand awareness across the sample, scoring 98.1% and 94.7%, respectively, followed by Shein (82.6%), ASOS (78.3%), and Mango (77.3%). Only 0.3% of the respondents did not know any of the mentioned brands. It can also be noted that H&M and Zara even score above 90% on the lower limit using a 95% Confidence interval, while all others are between 70% and 80% (see Table 25).

On average, the respondents know 4.3 of the brands with a standard deviation of 1.1, indicating that the chosen brands appeal to Gen Z. Even though both H&M and Zara have wide brand

recognition, there is a significant difference when considering whether participants have already purchased from said brand. For H&M, 90.2% of those that know H&M have also made a purchase, as opposed to Zara's 70.9%. Even though Shein has the third highest brand recognition, only 30.5% of those that know Shein have bought from the store. ASOS (53.5%) & Mango (56.3%) both performed better than Shein but worse than H&M and Zara (see Table 26).

#### **4.2.2 Relative Attribute Preferences**

The analysis of the relative attribute importance (see Table 27) revealed that overall price is the most important attribute, with a sample mean of 28.8%, indicating Gen-Z's high price sensitivity. However, it must be noted that this high value could also be driven by values that Gen-Z considers "extreme", such as too-high prices. The second most important attribute was the online retailer (19.7%). This could indicate, as already hypothesized within the analysis of the consumer interviews, that there is a high degree of brand loyalty to shop at a specific preferred online retailer. Jacket material (14.8%) and jacket color (13.2%) combined (28.0%) weigh together approximately as much as the price in the choice of the product. On the contrary, the bottom four attributes, minimum lifespan, delivery, sustainability, and return, account for "only" 23.8%, indicating that getting the utilities for those four attributes right is not enough to compensate for a fully mispriced jacket (see Figure 21).

#### **4.2.3 Level Preferences**

The analysis of the level preferences was carried out primarily using the preference of the average customer (see Table 28), unless stated otherwise.

The researchers saw that when it comes to the *Online Retailer*, there is an apparent dislike for Shein (-18.7%) even though the average prices for the items were lower due to the exclusion of high price levels (200 and 300€), indicating a severe dislike amongst Gen Z. The remaining four brands adopted positive values, with ASOS (6.6%) and Mango (5.9%) being the preferred

choices in the sample (see Figure 22). Considering each individual's preferences, the researchers observed that only 3.2% prefer Shein, and ASOS is the most popular (28.8%) (see Figure 23).

In terms of the *Jacket Material*, the average Gen Z customer shows a clear preference for cotton jackets (7.2%) followed by wool (0.6%) and fleece (0.1%). Authentic leather is the least preferred choice; however, this could also be the side-effect from the exclusion of the 30€ tag, thus being impacted by higher prices on average being shown (see Figure 24). This observation is also reflected in Figure 25, which shows that cotton accounts for nearly a third on an individual level.

Concerning the attribute *Sustainability*, the researchers saw that Gen Z's preference is also driven by the use of sustainable materials (see Figure 26). The difference becomes even more apparent when considering individual preferences, where recycled materials are preferred by 65.5% of the consumers (see Figure 27).

Regarding *Jacket Colors*, the researchers saw that out of the standard color palettes for jackets, Gen Z consumers prefer black jackets (+4.4%) over other colors, which might be surprising considering it attracts heat more than light white jackets (-3.1%), which are preferred the least (see Figure 28). While most colors are not perceived as drivers of the preference for the average customer (indicated through positive values), these jacket colors still account for 67.3% of the preferences among the consumers (see Figure 29).

When observing the levels that reflect the *Durability* and *Quality* of the jacket (minimum life span), one can observe that consumers prefer those with higher lifespans. The researchers observed that consumers dislike jackets with a minimum lifespan of up to 5 years, indicated by a negative value. The most significant jump (+3.4%) can be observed between 4-5 years and 6-7 years. The lowest value can be observed for a minimum lifespan of 2-3 years (-4.1%) and the highest for ten years (2.9%), which is only marginally higher than the one of 8-9 years

(2.8%) (see Figure 30). Overall, more than half of the individuals preferred lifespans of at least eight years (see Figure 31).

The factors *Delivery & Return Policy*, ranked in overall relative attribute importance sixth and eighth, respectively, showed the lowest range among the included utilities. Regarding delivery, the researchers recognized a range from -1.0% (same day delivery) to 0.7% (next day delivery), which might sound counterintuitive as faster delivery is preferred less. When considering the 95% confidence interval, it can also be seen that the upper limit of same-day delivery is still lower than the lower limit of next-day delivery. On the other hand, for the return policy, the sample means for utility part-worth ranged from -1.0% (5€ shipping costs covered by the consumer) to 0.9% (free return with drop off at post office) (see Figure 32 and Figure 33). When considering each consumer's preferences, the researchers saw that 17.1% prefer same-day delivery (see Figure 34). On the other hand, for the return policy the researchers acknowledged that while the option for a pick-up at one's house does not drive the average consumer's preferences (0.1%), 34.0% of all individuals had a preference for this level (see Figure 35).

The factor that showed the most extensive range was the *Price*, which was also perceived as the most important attribute relative to the others. Based on the survey, Gen Z seems highly sensitive to pricing, displayed by a very strong negative correlation ( $r = -0.994$ , significant at the 0.01 level) between price and the preference to buy a jacket (see Table 29). This effect can also be seen when looking at the relationship between the selection of a specific price level in relation to how often it was shown. Figure 36 shows that while jackets with a 30€ price tag were picked in 40.3% of the cases, jackets with a price tag of 150€ were only picked 21.3% of the time, and 300€ only 13.2% of the time, which is also reflected in the average preference (see Figure 37) and the distribution across all consumers (see Figure 38).

#### 4.2.4 Impact of Gender on Attribute and Level Preferences

The researchers also considered differences across the genders – only females and males were compared, considering the low sample size for “others” and “prefer not to disclose”. While the part-worth means for the attributes differ (see Table 30), the researchers recognized that not all deviations are significant. To test whether the differences are significant, an analysis of variance (ANOVA) was performed for the attributes with  $H_0 = \mu_{Female} = \mu_{Male}$ . The conducted ANOVA's (see Table 31) revealed that under a 95% confidence interval, the differences in the relative importance of jacket material, sustainability, minimum lifespan, delivery and return policy are not statistically significantly different by gender ( $p\text{-value} > 0.05$ ). Meanwhile, online retailers, jacket color, and price all adopted values below 0.05, indicating a significant difference. It can therefore be concluded that both online retailers (20.4%) and price (29.5%) are more important to females than to males (18.7% and 26.9% respectively). On the other hand, males value jacket color (14.2%) greater than females (12.6%). In the following, special attention will be paid to these attributes when analyzing the respective levels.

The data highlights that while males prefer to shop at ASOS (7.6%), Mango (6.6%) appeals the most to the female audience. The most significant difference can be observed for Shein, which females prefer less (2.2% lower than males) (see Table 32).

The higher importance of the attribute price is also observable within its levels, as displayed in Figure 39. It can be recognized that females prefer lower prices to a stronger extent than their male counterparts, with 100€ being the price level where the preference is the same regardless of gender. For any price level above 100€, it can be recognized that the female's preference diminishes faster than the males (see Table 33).

While black is the preferred jacket color for both genders, the researchers identified a stronger preference for black by the male audience (6.4%), which is 3.1% higher than the females. Furthermore, it can also be seen that the color blue also drives the preferences of males

positively (0.6%), while for females, the opposite is the case (-1.1%). A notable difference is also observable for the color brown, which is perceived negatively by males (-1.0%) and slightly positive by females (0.1%) (see Table 34).

#### 4.2.5 Marginal Willingness to Pay (MWTP)

To be able to conclude the pricing in relation to the features, the researchers analyzed the marginal willingness to pay, which is calculated via the formula  $MWTP_{i \rightarrow j} = \frac{-V_{i \rightarrow j}}{V_p}$ , where  $MWTP_{i \rightarrow j}$  is the marginal willingness to pay in order to switch from level  $i$  to  $j$ ,  $-V_{i \rightarrow j}$  the preference to upgrade to feature  $j$  from the baseline and  $V_p$  the price preference. Considering this formula, observations are done under *ceteris paribus*, where only one level changes and the others remain the same. In terms of the MWTP, significant differences (>30€) between the baseline (preferred choice) and the least preferred choice were observable in the following categories: *Online Retailer, Jacket Material, Sustainability, Jacket Color & Durability*.

Within the category of *Online Retailers*, a maximum difference of -133.72€ could be observed between ASOS and Shein. In this particular case, this extreme difference is likely due to Shein being prohibited from adopting prices of 250 and 300€. However, it can also be recognized that between ASOS and Zara, there is also an MWTP difference of -20.13€, indicating that the median individual would be willing to buy from Zara instead of ASOS if they are granted this price as a discount, while other attribute levels remain the same.

As *Jacket Materials* are typically associated with particular qualities such as weight, comfort, and warmth, a relatively strong preference for cotton could be observed reflected in a high MWTP of -34.72€ to switch to the second most preferred material – wool.

In the category of *Sustainability*, an MWTP of 32.65€ to switch to recycled materials was observed, indicating that the median consumer is willing to spend a significant amount of money on sustainable summer jackets.

As previously addressed, black is the preferred *Jacket Color*; despite the negative heating effect. The researchers observed that switching from black to white or light colors has an MWTP of -37.92€. An interesting observation in the context of the color was that while green was the 3<sup>rd</sup> most preferred choice (1% lower than brown), the median consumer is willing to pay more for a green jacket (-17.94€ to switch from black to green opposed to -27.28€ for the switch to brown). This could indicate that consumers do not see enough green jacket options on the market.

In terms of the minimum lifespan of jackets, the researchers saw the biggest jump in the MWTP between the option of 2-3 years and 4-5 years with 16.71€ and the second biggest jump between 6-7 and 8-9 years with 12.47€.

While return policy was not flagged as a significant change (>30€), the researchers noted that the option with paid return (5€) has an MWTP of -10.30€, which is why depending on the return ratio, some companies should offer free returns by default (based on this finding, which does not factor in the higher preference discussed in subchapter 4.2.3).

#### **4.2.6 Segmentation**

In the last step, the researchers constructed four segments based on the relative importance of the attributes (see Table 35). The segmentation was carried out using the ward's method with a squared Euclidean distance interval and Z-score standardized values.

The largest segment, "The Frugals", is even stronger price driven reflected in a 37.5% sample part-worth mean (+9.0% over the overall mean). Considering the higher price sensitivity of females established in Chapter 4.2.4 it is notable that this segment comprises a higher proportion of females than the overall sample (+6.0%). Additionally, the researchers observed a higher proportion of individuals with an income of 500€ or less (+6.2%) and students (+7.6%), suggesting that those with lower financial means are more price sensitive (see Table 35 and Table 36).

The second biggest segment, “Color Enthusiasts”, on the other hand, values the jacket color much higher than the average with 19.6% (+6.4%). Additionally, this segment values delivery (9.2%) by 37.3% higher than the average. Similar to the previous segment, the researchers recognized once again the impact of the gender differences in this segment, with more males (+6.2%) being part of this segment and 8.5% more full-time employees, which is also reflected by the income distribution leaning more towards the right (see Table 35 and Table 37).

Thirdly, the segment “Material Matters” was identified. The choice of material and durability primarily drives consumers of this segment. While price remains the most critical single factor (20.5%), jacket material is the second most crucial factor with 19.8% (+5.0% over overall mean) accounting together with durability for 30.2% of the total. This segment comprises a higher proportion of males (+10.9%). Additionally, the researchers recognized a shopping frequency distribution leaning more towards the right, indicating that these consumers typically buy products more seldom, look for superior quality, and are less sensitive to pricing (see Table 35 and Table 38).

The last segment identified, “The Brand Loyalists”, feel very strongly about the online retailer they choose, reflected in a 28.6% part-worth mean (+8.9%), making it the most crucial factor for this segment. The part-worth means gained can be attributed to a deduction of -10.5% relative attribute performance for pricing, showing the vital importance of the branding to this segment (see Table 35 and Table 39). As Table 40 displays, this segment is primarily attracted to Zara (36.7%) and Mango (31.9%) and driven by an even stronger disfavor for Shein with only 0.9% (as opposed to 3.2% for the overall sample).

## 5 Additional Experiments

### 5.1 Scenarios on Gen Z Consumers Preferences

#### 5.1.1 Methodology

The conjoint analysis and the perceptual map discussed in Chapters Three and Four aimed and enabled to answer the questions “*How does Gen Z behave when purchasing jackets online?*” and “*What do consumers expect from fashion brands in their shopping experience?*”, respectively. Nevertheless, to analyze and answer the third research question: “*How can brands adapt their strategy to the shift of needs in this generation?*” we conducted additional research. This extra analysis aims to evaluate consumers’ perception of the shopping experience, their preferences and how they would act when faced with different situations. These different circumstances can help the researchers understand how brands can find attractive solutions to target Gen Z consumers and better meet their needs and expectations.

The chosen research follows a quantitative approach. Most of the analysis was based with primary data: the results from both the conducted conjoint analysis and perceptual map and secondary data: H&M Website and other online fashion resources.

To understand how Gen Z consumers would act when faced with multiple scenarios, researchers conducted a survey with varied situations, in which consumers would select the answer they would find more suitable to their preferences and expectations.

Ultimately an ANOVA was conducted to measure the influence of the demographics of the sample. As a result, to assess the effect of the sample demographics on the final results, specifically the averages for each question, a series of ANOVAs were conducted using the statistical analysis software SPSS.

Given this, researchers decided to choose the sample demographics “Gender” in order to understand if the answers to the question varied with gender.

Also, researchers decided to choose “Professional Status” as a second demographic of the sample in order to understand if the different professional status would impact the answer to the questions.

### **5.1.2 Survey Construction**

As mentioned in Methodology Chapter above, the researchers decided to create a survey to answer the research questions and analyze how Gen Z consumers would react when placed in different scenarios.

Given this, researchers created the survey using Google Forms, and this one was available for six days. Google Forms was chosen for its simplicity, as it allows to create the survey and record the answers instantly, giving access to the results as they come in. Also, similarly to the Google Form used for the creation of the Perceptual Map, two members of the group reviewed and ensured the clarification and the quality of the questionnaire was in place, in order to control any sampling errors.

The survey was launched in platforms that are popular among Gen Z consumers. This way researchers could ensure a greater number of replies and even a better engagement and responsiveness from the audience. Given this, the different channels where the survey was shared included Instagram, Facebook, LinkedIn and WhatsApp. In addition, researchers also counted on with the help of friends and family members to answer our questionnaire, having shared the survey through messages and WhatsApp groups.

The questionnaire had a total of 14 questions, and it was composed by three different sections. The first section was to determine whether the participants corresponded to our study. This had the goal of ensuring our surveyed participants were part of Gen Z and, secondly, that the

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participants were all online shoppers. This way it was ensured the answers would be filtered and the sample was relevant for our study.

Next, the second section was dedicated to different scenarios. The questions were composed to connect and to correlate different attributes to different scenarios. This enabled researchers to understand how consumers would react when confronted with two possible scenarios and therefore analyze their preferences and expectations on online shopping and brands.

Last, the final section was concentrated on demographics. This was important to evaluate segments such as age, gender, professional status, education level, income, and geographical location. With this, researchers were able to understand the background and the traits behind the sample.

Regarding scenarios sector, this one consisted of six questions. These questions were composed of varied scenarios and participants were asked to imagine themselves in certain situations. Given this, they would have to choose the option they preferred or how they would react in a certain situation.

The first question asked participants to imagine themselves in a scenario where they wanted to buy a summer jacket online but were confronted with shipping costs. As a result, they were asked to choose between a) spending extra money but having the item delivered at home or b) saving money but picking up the item in-store. This question aimed to understand how consumers perceive convenience and price, especially when confronted with shipping costs. As a result, the goal was to understand how Gen Z consumers value and weigh down their options when choosing between the convenience of doorstep deliveries and having to pay extra for the item shipped. As mentioned in Chapters 2.4.2. and 2.4.3., Gen Z consumers are both price and convenience conscious. Nevertheless, price sensitivity is one of the most critical factors in this cohort.

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Therefore, with this question, researchers want to determine whether, despite having to pay for shipping costs, the convenience of doorstep delivery outweighs the cost of paying for the packages to be sent home.

Afterward, the second scenario confronted correspondents with a situation where they would accumulate points every time they made purchases with a brand. As a result, they would then be able to redeem these points in exchange for discounts in any possible channel (physical or online stores). Given this offer, the participants were asked if their willingness to make purchases with this brand would increase. Literature and the results obtained from the conjoint analysis and the perceptual map suggest consumers are price sensitive and value monetary incentives. For this reason, the objective of this question is for researchers to understand and confirm if discounts impact and influence consumers' willingness to pay and if these Gen Z customers are more drawn to brands that make efforts to provide customers with financial incentives.

Next, as a third question participants were confronted with a scenario where they want to purchase a summer jacket and they come across a jacket their favorite influencer recommended. However, the price is slightly over their budget. As a result, the respondents were asked if the recommendation of their favorite influencer increased their willingness to buy. Regarding this question, researchers want to comprehend if influencers, who are so important in providing inspiration for their Gen Z audience, have an actual impact on consumer's perception of online shopping and influence consumer's purchase decisions.

Thereafter, the fourth question presents a situation where consumers are looking for a summer jacket. During their search they come across positive reviews of the product, however, their

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friends tell them the price-quality ratio of the jacket is not worth it. Given this, participants are asked to select the answer they identify themselves the most a) still buy the jacket – highly regard the positive reviews online, b) buy the jacket anyway because they don't value their friend's opinions or the reviews as much or c) don't buy the jacket because they take into consideration their friend's opinions. With this question, researchers want to understand how Gen Z consumers perceive and value the reviews of the products they search for and to what extent their friends' opinions influence their purchase decision. The reality is that literature suggests both are relevant in Zoomers' shopping experience. Nevertheless, researchers want to understand the importance and the role of influencers and their reviews of products online, the impact of the availability of customer ratings, and the influence of friends and family members in the purchase decision.

Next, the fifth question puts correspondents in a scenario where they can purchase a summer jacket with no extra costs for delivery. Correspondents can choose between two different options a) choosing a "click and go option" to pay for the jacket online and immediately picking it up at the nearest store or b) receiving the package at their doorstep, having to wait for two to three days for the package to arrive at their houses. The purpose of this inquiry is to understand if the presence of omnichannel such as the option of "Click and Go" is attractive to consumers and facilitates their shopping experience, especially if consumers can have immediate accessibility to the item in the nearest store.

Finally, participants were presented with the H&M campaign: "Close the Loop" encourages consumers to recycle outworn clothes. Therefore, customers receive rewards when dropping off their used clothes at recycling bins in-store. The goal of this question is to understand how Gen Z perceives initiatives taken by brands, especially fast fashion, and if they are more likely

to shop with them when presented with sustainable efforts. Also, if Gen Z consumers perceive these brands are making actual efforts to meet their needs and expectations and become more sustainable brands, this can increase brand loyalty among post-millennial consumers.

Lastly, the third section was constructed to collect information regarding demographics.

Given this, the descriptors used to collect the data were the following: i) gender, ii) age, iii) education level, iv) professional status, iv) income, and v) country.

All questions in the survey were multiple questions, except the last one, in the third section, where correspondents had an open question to write their country. The questionnaire is depicted and can be consulted in Table 41 of the appendix. The survey was anonymous and was available to be answered for six days, recording 222 responses and the recorded average response time was six minutes per correspondent.

### **5.1.3 Sample Analysis**

The survey was available from April 23rd to April 29<sup>th</sup> and there was a total of 221 responses, As mentioned above, the first section was used to filter any participants who were not part of Gen Z, or that did not shop online. As a result, only one correspondent was not part of Gen Z (see Figure 40), and another had never shopped online (see Figure 41), leading to 219 accurate answers.

Regarding demographics, the researchers observed that the gender ratio between female and male respondents was relatively balanced. The sample contained 53% female correspondents while 47% were male participants (see Figure 42).

In addition, concerning the age segment, it was observed that most participants were early Gen Z consumers, with 70% born between 1997 and 2004. This group segment was relatively evenly distributed, with 33% of participants aged between 19-22 and 37% between 23-26 years old.

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Younger Zoomers represented the other 30 % of the sample. While respondents aged between 15-18 years old corresponded to approximately 22% of the sample, the remaining 8% represented 11-14 years old (see Figure 43).

Additionally, regarding education level, most responders had obtained a higher education level. While 25% had a bachelor's degree, 28% had earned a master's diploma.

Approximately 2% of the sample had even completed an MBA or a Ph.D. Furthermore, 27% of the respondents had completed a high school education, while 18% selected "less than high school" to represent their education level (see Figure 44).

In terms of professional status, most of the surveyed participants were students, representing 67% of the sample. Researchers expected this left-sided distribution, since Gen Z members are aged between 11-26, it was expected that a considerable portion would still be pursuing an educational level. Nevertheless, 22% of participants were full-time employees, while 11% answered that they were employed in a part-time regime. Only one person selected "none of the above" as their professional status accounting for 0.5% of the sample (see Figure 45).

Given that approximately two-thirds of the surveyed participants were students, it is unsurprising that more than half (52%) have a monthly liquid income of 500€ or less. While 13.3% earn between 501€ and 999€ and 19.6% receive between 1000€ and 1999€, only 16% make more than 2000€ (see Figure 46).

Finally, concerning the last demographics segment analyzed, most of the respondents were German (39.7%) and Portuguese (37%), with Italian (8.2%) and Spanish being the two second most popular nationality (10%). Additionally, France accounted for 3.7% of the participants' country of origin, with also two respondents from the United Kingdom and one from Switzerland (see Figure 47).

#### **5.1.4 Scenario Analysis**

To assess the effect of sample demographics on the final results, specifically the averages for each question, a series of ANOVAs were conducted. The researcher used the statistical analysis software SPSS, to determine if it was possible to conclude that the average of each question for each demographic group trait was not identical. Then, using SPSS once more, the overall averages for each query were calculated.

It is required to begin with the aggregate average to gain a greater comprehension of the survey questions.

The first query asked respondents to envision a scenario in which they wished to purchase a summer jacket online but was confronted with shipping costs. Therefore, they were required to choose between 0 = saving money by picking up the item in-store and 1 = spending more money by having the item delivered to their residence. Researchers can conclude, based on an average response rate of 0.379, that most participants chose the first option.

The second scenario presented respondents with a situation in which they would accumulate points whenever they made a purchase with a particular brand. Consequently, they would be able to redeem these points for discounts across all channels. Given this offer, survey respondents were asked if their propensity to purchase this brand would increase (0 = yes, 1 = no). Based on the average response rate of 0.1324, researchers may deduce that most of the participants selected the first option.

Subsequently, as a third query, participants were presented with a scenario where they wished to purchase a summer jacket and came across one that was recommended by their favored influencer but was slightly out of their price range. As a result, respondents were asked if the recommendation of their favored influencer increased their propensity to purchase, with 0

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indicating yes and 1 indicating no. Researchers may conclude, based on the average response rate of 0.21, that more than half of the participants selected the first option.

The fourth query then presents a scenario in which consumers are searching for a summer jacket. During their search, they come across positive product evaluations; however, their friends inform them that the price-to-quality ratio of the jacket is unjustifiable. Participants were then instructed to select the response with which they most strongly identify: 0 = still buy the jacket – highly value the positive online reviews, 1 = buy the jacket regardless because they don't value their friends' opinions or the reviews as much, and 2 = do not buy the jacket because they value their friends' opinions. Based on a mean response rate of 0.817, researchers could infer that the majority of the respondents picked the first option and the second highest was the second option.

Therefore, the fifth question places respondents in a situation in which they can purchase a summer jacket with no delivery fees. Correspondents could choose between two options: 0= choosing a "click and go option" to pay for the jacket online and promptly pick it up at the nearest store, or 1= receiving the jacket at their door and having to wait two to three days for the package to arrive at their homes. Based on the average response rate of 0.301, researchers determined that over fifty percent of respondents chose the first option.

Lastly, participants were provided with H&M's "Close the Loop" campaign, which encourages consumers to recycle worn out clothes and offers incentives in exchange for participation. Given this, participants were asked if campaigns such as these influence how they perceive brands, with 0 = affirmative and 1 = negative. Researchers found that a majority of respondents selected the first option based on the average response rate of 0.256 (see Table 42).

Furthermore, the researchers considered gender differences; however, only female, and male participants were compared due to the absence of data for "others" and "prefer not to disclose."

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An analysis of variance (ANOVA) was conducted for the questions to determine whether the differences are significant.

The conducted ANOVAs showed that question 1, question 2, question 3, question 4, and question 5 are not statistically significantly different by gender ( $p\text{-value} > 0.05$ ) within a 95% confidence interval. In between, question 6 adopted values below 0.05, indicating a significant difference (see Table 43).

Therefore, the answer to question 3, "Would the recommendation of your favorite influencer increase your willingness to purchase?" is affirmative. Females are marginally less impacted by influencers (0.216% versus 0.204%), although the differences are not significant.

However, in the remaining queries, males have higher values than females.

The largest disparities can be seen in question 1, question 5 and question 6. In the first question, males are more likely than females to pick up the clothing in-store in order to save money. Males are more probable than females to favor waiting for home delivery of their purchases, according to the results of the following question. Although, the only difference that is significant is that men are less likely to be influenced by campaigns than women (see Table 44).

To sum up, the majority of the questions are not statistically significant under a 95% confidence interval, the researchers still analyzed them due to their overall significance in answering the third research question.

Besides Gender, the researchers considered potential differences across professional status; however, due to the small sample size for "none of the above," only student, part-time employed, and full-time employed were compared. To determine whether the differences are statistically significant, an analysis of variance (ANOVA) was conducted on the questions with

the ANOVAs performed, researchers concluded that question 2, question 3, question 4, question 5, and question 6 do not differ statistically significantly by professional status ( $p$ -value  $> 0.05$ ) within a 95% confidence interval. In contrast, question one adopted values less than 0.05, indicating a significant difference. (see Table 45 and Table 46).

To sum up, full-time employees are more likely than students or part-time employees to choose the option to pick up the item in-store and save money (shipping cost) when purchasing online.

## **5.2 Conjoint Analysis via ChatGPT**

Additionally, the researchers wanted to test whether AI chatbots that leverage natural language processing can produce results comparable to those generated via traditional means. These findings are interesting since AI can enrich marketers' work already today if the results are accurate. Carrying out the conjoint analysis via a solution such as ChatGPT generates results within minutes instead of waiting several days for hundreds of participants to complete a survey. If faulty, surveys can be easily adapted and rerun without waiting multiple days. This technology is particularly beneficial in environments where consumer preferences change rapidly and businesses launch products rapidly, such as in the fast-fashion industry. Using this technology could enrich the work of marketers and researchers, as it allows them to save time and financial resources that occur running studies the traditional way.

To test this, the researchers used ChatGPT 3.5, the currently most used platform offering such services for free. ChatGPT was provided with the following data to run the experiment: all seven attributes and the levels they can assume, the focus on Gen Z and the focus on summer jackets.

The first results generated by ChatGPT showed severe shortcomings compared to the survey results. Figure 48 shows that by default, the chatbot only assesses the relative attribute importance of price with 1.1%, which, if true, could be considered an irrelevant factor.

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However, the researchers noted in the literature review that Gen Z is generally very price-conscious, which also aligns with the findings of the surveys carried out by the researchers. Additionally, the researchers noted that ChatGPT expected the point sustainability to be much more critical (16.2% vs. 5.1%). Leaving these two points aside, the researchers acknowledged that ChatGPT ranked the other attributes in order of their importance in the survey. The researchers, therefore, decided to provide ChatGPT the information that, overall, the importance of sustainability in other segments has been declining for Gen Z over the last few years and that Gen Z is said to be highly thrifty to generate Figure 49.

The second comparison undertaken in Table 47 (based on the extract provided in Figure 49) shows that ChatGPT could now rank the relative attribute importance much more accurately. This finding becomes especially apparent if one was to rank the attributes in order of their importance the five most important attributes (price, online retailer, jacket material, jacket color, minimum lifespan) and the least important attribute (return policy) are ranked the same in the survey by the researchers and the results generated by ChatGPT. The only difference is that while ChatGPT would rank sustainability sixth and delivery seventh, the ranks are switched in the conducted survey.

The researchers recognized that the attribute ranges provided by ChatGPT had no deviations of more than 3.5% (price being the highest). It is also worth noting that the value found by the researcher is within ChatGPT's range for both the online retailer and the jacket color. While jacket material was not within the range, the difference is only slight with -0.2%. The most considerable deviations aside from the price were observable within sustainability and the minimum lifespan of the jacket. For sustainability, the chatbot assumed that it is much more important to Gen Z, with the researcher's findings being 2.9% below the lower end of the range and 6.9% lower than the upper range. A potential reason for this could be ChatGPT's knowledge

cutoff date of September 2021, which could indicate that the importance of sustainability to Gen Z has decreased since then.

The researchers also tested ChatGPT's capability to estimate the highest preferred levels for each attribute, thus providing the product configuration preferred the most. The results (see Figure 50) reveal that the chatbot's estimation is identical to the researchers' findings for the four most important attributes (price, online retailer, jacket material, and jacket color). While for minimum lifespan and return policy, ChatGPT did not identify the option preferred most by the participants, the chatbot still mentioned the second most preferred option (difference of -0.1% for minimum lifespan and -0.8% for return policy). The only attribute that ChatGPT completely misevaluated is the delivery, where the bot provided CO2 neutral delivery as the level which is preferred 1.5% less by the average consumer and the second to last preferred option, which could again be driven by the fact that ChatGPT systematically over evaluates the importance of sustainability to Gen Z.

## **6 Conclusion**

### **6.1 Discussion**

The evaluation of the research is an interpretive evaluation, and it should be noted that subjective priorities were set in the identification process.

#### **Research question 1**

The results of the conducted surveys provide exploratory insights to answer:

*RQ1 – “How does Gen Z behave when purchasing jackets online?”*

A recent study conducted by researchers investigated that Gen Z purchases fashion online as well as in-store, whereas online shopping frequency was found rather frequent, with nearly half of the respondents of the survey indicating that they shop online once every one to three months. This finding suggests that online shopping has become a routine and regular part of many consumers' shopping behaviors.

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It was also found that the primary sources of inspiration for Gen Z are predominantly of digital nature, specifically on social networks such as Instagram, TikTok, and Pinterest. This observation is consistent with the theoretical framework presented in Chapter 2.6.1, which highlights the popularity of social media platforms like Instagram, TikTok, Facebook, and YouTube among Gen Z. These platforms have become a primary source of inspiration for this young generation, who expect to be actively engaged and derive inspiration from these channels.

However, as presented in Chapter 4.1.2, family, friends, and influencers still hold significant sway over the purchasing behavior of Gen Z. This assertion is further corroborated by the findings of the study, which demonstrate that respondents identified friends as their primary source of influence, followed by family and influencers. In contrast, celebrities were found to have a limited impact on the purchasing behavior of this demographic, with more than half of the respondents reporting only a slight influence.

Brands targeting Gen Z must carefully consider the role of these sources of inspiration and influence and develop strategies that effectively engage with Gen Z through these channels.

When it comes to channels used for online purchases, research has shown that retailer websites are the most used, followed by online marketplaces and fashion-specific marketplaces. This may be due to the fact that consumers feel more confident purchasing from established retailers they trust, rather than from unfamiliar or lesser-known sources. On the other hand, social media shopping and outlet store websites were found to have the lowest scores in terms of popularity. This may be because social media shopping is still a relatively new concept, and consumers may not feel as comfortable purchasing from social media platforms as they do from established retailers yet.

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Trying to understand Gen Z's shopping behavior better, the results of the conjoint analysis indicate that price is the most important factor for Gen Z when making purchasing decisions for summer jackets. The theory of Chapter 2.4.2, as well as the results of the survey, suggests that Gen Z consumers are price-sensitive and are likely to be motivated by cost savings and material gain in their purchasing behavior. This aligns with the trend of showrooming in Chapter 2.2.1, where consumers visit physical stores to examine products before making a purchase online, often in search of a better deal. By engaging in showrooming, Gen Z consumers can compare prices and find the best deal, which aligns with their tendency to prioritize cost savings and economic incentives. Indeed, it is reasonable to infer that a significant proportion of the survey respondents have been students, given that this demographic is known to have limited financial resources. The importance of price as a decision-making factor may also be indicative of the financial constraints that many Gen Z consumers face, particularly as students with limited incomes. As such, the budgetary constraints that come with being a student may have a substantial impact on the purchasing decisions of Gen Z consumers, with opting for the best price being a priority.

In light of these findings, Brands and retailers must therefore carefully consider the economic incentives and deals that they offer in order to attract and retain Gen Z consumers. Such incentives may include loyalty programs and exclusive deals and discounts for online shoppers who visit physical stores aimed at promoting economic value. Brands that fail to provide these incentives may find it difficult to compete with other brands that offer them, especially as Gen Z consumers are more likely to prioritize cost savings in their purchasing behavior.

Despite the literature suggesting that Gen Z is less loyal to brands, the survey results indicate that brand is still a significant factor in their purchasing decisions for fashion apparel, ranking second after price. This suggests that while Gen Z consumers may be more focused on cost

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savings and economic incentives, they still value brand identity and the image that a brand projects. As stated in Chapter 2.2.2, by providing a seamless shopping experience across multiple channels, brands can create a cohesive and consistent brand identity that resonates with consumer's values, beliefs, as well as expectations, and preferences. In light of this, it is reasonable to suggest that the preferred choice of Gen Z consumers towards the brands ASOS, Mango, and Zara indicates that these brands have successfully addressed their values, beliefs, and preferences. This is because, as per the survey findings, Gen Z consumers tend to prefer these brands, implying that these brands have succeeded in creating a strong bond with this consumer segment.

A possible explanation for why these three retailers have been successful in creating a bond with Gen Z may be that these brands have been able to maintain a strong social media presence and offer unique and trendy designs at an affordable price point, which appeals to Gen Z's preference for personalization and affordability (see Chapter 2.4.). Based on the results of the survey, it appears that respondents Gen Z has a severe dislike for Shein. Although Gen Z consumers are known for being price-sensitive and tend to shop from fast fashion retailers, these results indicate that these factors are not the only important ones.

In fact, Sustainability seems to be an important attribute in the context of fashion consumption of Gen Z, specifically concerning summer jackets. The findings of the study reveal that Gen-Z consumers display a clear preference for summer jackets made from recycled materials, which underscores the significance of sustainability in their shopping behavior. Interestingly, when individual preferences are considered, nearly two-thirds of consumers favored recycled materials in their summer jackets. This indicates that sustainability is not merely a passing trend, but rather a genuine concern among this demographic. It is noteworthy that sustainability has emerged as a significant factor in fashion consumption, driven by the increasing awareness

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of the detrimental impact of the fashion industry on the environment. Regardless of the significance of sustainability to the younger generation, empirical evidence suggests that when presented with a choice between standard delivery and one with the option of CO<sub>2</sub> offsetting which has identical delivery time, the former is preferred over the latter. This finding suggests that although Gen Z places a high value on environmental responsibility, the option of CO<sub>2</sub> offsetting may not necessarily align with their preferences for delivery options.

Understanding the complex interplay between the mentioned factors attributed to purchasing behavior is crucial in developing effective strategies for fashion retailers to cater to the preferences of Gen Z consumers, who are rapidly reshaping the industry. It can be stated that online shopping has become an increasingly popular avenue for Gen Z consumers to purchase fashion apparel due to the convenience it offers. As discussed in Chapter 2.1, online shopping provides a vast selection of products and a wealth of information about those products. This wealth of knowledge empowers Gen Z consumers to make informed purchase decisions, with the ability to search for inspiration and acquire information via their preferred channels. Gen Z discovers inspiration through social networks and the influence of friends, family, and influencers. This underscores the expectation that brands maintain a presence and remain accessible across multiple channels, necessitating an omnichannel approach. To foster engagement across channels, companies must develop the power of social commerce, as Gen Z values mobility and seeks to be addressed through these platforms. However, social media is not the sole channel of importance, as mentioned before the researchers found out that also other channels such as the retailer's website, online marketplaces, and fashion-specific marketplaces are also relevant.

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Despite the growing trend towards online shopping, the large majority of respondents of the survey still value shopping in-store. There are several reasons why consumers may prefer this in their shopping behavior for fashion. One reason is the predictability of fit and sizes. When trying on clothing in-store, consumers can ensure that the item fits properly and suits their body type before making a purchase. This can help reduce the likelihood of needing to return items due to sizing issues. Another reason why consumers may prefer shopping in-store is that they can physically inspect the quality of the product. This is particularly important for fashion products, where consumers may want to feel the fabric before making a purchase.

### **Research Question 2**

To answer the RQ2 – “*What do consumers expect from fashion brands in their shopping experience and the purchased product?*” the researchers gathered the results of the two Analyses presented in Chapter 4.1 and Chapter 4.2.

The second research question of this thesis deals with the Customer Journey and the value concepts of Gen Z.

The customer journey starts with the research and prepurchase stages, as delineated in Chapter 2.2.2. The customer journey incorporates a range of touchpoints, with an ever-increasing emphasis on digital touchpoints. In Chapter 2.2.2 the researcher has identified various digital touchpoints, which encompass mobile applications, online advertisements, search results, social media pages/profiles, online influencers, blogs, live chats, price comparison websites, online intermediaries, and virtual assistants. Consequently, it is crucial for brands to establish and leverage these touchpoints to ensure an optimal customer experience.

In the pre-purchase phase, customers' decision-making is heavily influenced by information and inspiration channels. The surveys indicate that respondents use both online and in-store

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shopping for clothing, preferring in-store due to predictable fit, easy quality assessment, and immediate availability. However, the social aspect and customer service hold little importance for Gen Z. To enhance online shopping, companies should address these unmet needs. For instance, leveraging artificial intelligence (AI) solutions, as discussed in Chapter 2.6.3, could help bridge the gap between online and offline experiences. Social commerce platforms have already begun incorporating AI solutions that allow customers to virtually "try on" products (see Chapter 2.6.3). Fashion brands could benefit from expanding the use of AI solutions to recreate the advantages of offline shopping in an online environment. This approach could also be applied to material assessment, with potential AI innovations enabling customers to better understand a product's material without the need for an in-store visit.

Addressing the issue of immediate product availability is a greater challenge. While it is difficult to replicate the instantaneous nature of in-store purchases, companies should nevertheless strive to improve this aspect. Delivery time is crucial for Gen Z, as excessive waiting periods may generate negative associations with a brand (see Chapter 2.5.2). This finding from the literature is substantiated by the survey results, which indicate that participants place significant importance on the delivery time. The researcher discovered through the conjoint analysis that delivery accounted for 6.7% of the relative attribute. Furthermore, in the perceptual analysis, the delivery time was ranked as "neutral" in terms of importance for each brand (see Chapter 4.1.2). The conjoint survey found that while Gen Z does expect fast delivery, they actually prefer next-day delivery over same-day delivery. This may seem counterintuitive at first, as same-day delivery would seem to be the faster and more convenient option. However, the study suggests that Gen Z values predictability and reliability more than immediacy. This would also go along with the success of Amazon's prime strategy.

With Amazon Prime, customers in many countries can receive products the following day. Although this may not achieve true immediate product availability, it addresses Gen Z's

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demand for expedited receipt of their purchases. Nonetheless, instantaneous product availability remains a unique advantage of the offline shopping experience.

Next-day delivery provides a predictable timeframe for when their order will arrive and allows them to plan accordingly. Same-day delivery, on the other hand, may be more unpredictable and subject to delays or complications, which can be frustrating for Gen Z consumers. It is worth noting that these preferences may vary depending on the type of product being purchased. For example, Gen Z may be more willing to pay for same-day delivery for urgent or time-sensitive purchases, such as last-minute purchases. Overall, Gen Z's expectations for fast and efficient delivery reflect their desire for a seamless and frictionless shopping experience.

The implementation of an omnichannel approach can present retailers with the opportunity to offer their customers a diverse range of delivery options, including but not limited to in-store pickup, same-day delivery, and next-day delivery. By doing so, retailers can provide customers with greater convenience and flexibility in terms of delivery preferences while simultaneously enhancing the overall efficiency and effectiveness of their supply chain management. This enables customers to select the option that best aligns with their specific requirements, whether they require immediate delivery or are willing to wait a few days. Moreover, an omnichannel approach can also contribute to the improvement of the overall customer experience by enabling greater convenience and flexibility in addition to faster delivery times.

In order to meet the expectations of Gen Z's customer journey, the use of social media has become a critical strategy for brands, as emphasized in Chapter 2.6, which underscores the significance of social media as a key tool for marketers to reach this demographic. Given that this cohort places significant importance on the opinions of their peers, it is imperative for

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brands to establish a strong presence on social networks and attract attention in order to effectively engage with Gen Z customers. Furthermore, the contemporary social media landscape extends to the engagement of influencers, as emphasized in Chapter 2.6.3, highlighting the importance of enlisting these opinion leaders. To captivate potential customers during the pre-purchase stage and ensure their commitment throughout the subsequent phases of the customer journey, brands should use and improve these marketing instruments.

During the pre-purchase phase, Gen Z consumers anticipate finding inspiration and acquiring information via their preferred channels. This engagement may involve direct interaction or be facilitated by influencers. To foster such exchanges and promote them effectively, companies must develop the power of social commerce, as Gen Z values mobility and seeks to be addressed through these platforms. However, social media is not the sole channel of importance. The survey indicates that the most frequently utilized channel for online purchases is the website of the online retailer itself (see Chapter 4.1.2). Nonetheless, Gen Z discovers inspiration through social networks and the influence of friends, family, and influencers. This underscores the expectation that brands maintain a presence and remain accessible across multiple channels, necessitating an omnichannel approach. The significance of this omnichannel approach extends to the purchase phase, emphasizing its relevance throughout the entire customer journey.

The existing literature posits that social media, influencer marketing, and social commerce are gaining prominence, but to what extent does empirical evidence support this assertion? Survey results indicate that the majority of individuals continue to shop both online and offline. Contrary to the theoretical assumption that social commerce—product sales on social networks—is becoming increasingly vital for this generation, the most frequented channels for

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online purchases are not social networks. However, this discrepancy does not warrant dismissing the assumption altogether. Social commerce remains in its nascent stages and is likely to grow in importance in the coming years. This supposition is corroborated by survey findings, which reveal that nearly 20% of respondents are willing to engage with social networks for purchases, even though features enabling this have only been available on platforms like Instagram since 2018 (see Chapter 4.1.2). Given the concurrent use of social media and television, it is reasonable to anticipate that social commerce, as a component of social media marketing, will gain traction among society at large. Consequently, future generations, including Gen Z and "Zoomers," can be expected to increasingly adopt, utilize, and demand social commerce.

During the purchase phase, product attributes play a crucial role in shaping customer decisions. Brands must identify and prioritize these attributes to satisfy customer demand effectively. Gen Z, characterized by its appreciation for uniqueness, convenience, sustainability, and price consciousness, holds specific expectations for brands in the online shopping context. This demographic anticipates that brands will cater to their digital preferences by offering user-friendly, visually appealing websites and maintaining a reputable standing. Credibility is crucial for this cohort, as it significantly influences their ultimate purchase decisions. The literature suggests that Gen Z exhibits reduced brand loyalty and is inclined to switch suppliers if presented with a better offer. In the survey administered, respondents were queried about individual attributes to discern their importance. For brands like Zara and Mango, the most important attributes for consumers are return policy, delivery time, and shipping costs, while for Asos, Shein, and H&M the priorities are price and discount. Across all brands, price emerges as the most critical attribute, with design and quality also holding substantial importance for Gen Z. Moreover, this group is highly receptive to discounts. Consequently, it

can be inferred that Gen Z seeks a shopping experience featuring competitive pricing, high-quality clothing, appealing design, and periodic discounts (see Figure 51). To provide a positive customer experience, brands must recognize and fulfill these expectations by emphasizing crucial attributes.

Nonetheless, it is essential to acknowledge that, generally, all attributes can be deemed significant. Although the attributes mentioned may hold the greatest importance for Gen Z, it is likely that a positive purchase decision results from a combination of all attributes rather than the fulfillment of a single attribute. It is insufficient for brands to offer clothing at exceptionally low prices, as this may imply poor quality. While Chapter 2.4 posits that Gen Z values uniqueness, convenience, and sustainability, these aspects are not unequivocally confirmed by the present study. The survey does, however, emphasize the cohort's price consciousness.

In the post-purchase phase, brands continue to face requirements and expectations from Gen Z consumers. As with the prepurchase phase, reviews and exchanges with the brand are also significant. Chapter 2.5 highlights the importance of exchanging information and reading reviews among Gen Z, which is partially supported by the perceptual survey. While the survey reveals that social media is the primary source of inspiration for most in this cohort (see Figure 10), it does not delve into the nature of these exchanges.

Theoretical research suggests that exchanging information with the brand or other customers is crucial for Gen Z. Brands can encourage and facilitate this exchange using social commerce. Social commerce can bring customers closer to the brand and establish a connection. Similar to influencers, customers with an emotional attachment to a brand are more inclined to purchase products if they have a connection with the brand. This connection can be fostered not only through exchanges but also by representing the same values. Although the perceptual survey

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cannot definitively confirm that sustainability is as important as assumed for this cohort. However, it is reasonable, due to the results of the last survey, to assume that brands with a sustainable image can expect greater acceptance among Gen Z consumers.

In addition to reviews and exchanges with the brand, Gen Z has other expectations of its fashion brands in the post-purchase phase. Chapter 2.5 highlights the relevance of return and refund policies for this cohort, which is partially supported by the perceptual survey. For the brands Mango and Zara, this attribute was selected as one of the top three most important attributes for consumers when purchasing one of these brands. Simultaneously, for H&M, Shein, and ASOS, these attributes are not as relevant for consumers as for the other brands. By synthesizing these findings, it can be inferred that it remains a crucial aspect, albeit not necessarily a decisive factor during the purchase phase for all brands.

Return and refund policies are especially significant for online purchases, as in-store purchases can reduce the risk of ill-fitting clothing. However, to minimize the risk of online purchases, return policies become crucial for customers. If customers can easily return items that do not fit, their willingness to purchase items online increases, as they feel more confident about their ability to return items if needed. The researcher discovered that when customers were required to pay for shipping, it negatively influenced their product preference, as evidenced by a lower MWTP compared to the alternative options: free return via post office drop-off and home pick-up. Moreover, the study found that dropping off at the post office was the most preferred option, in terms of both MWTP and overall preference (see Chapter 4.2.5). Therefore, a well-designed return policy can enhance customer satisfaction and foster brand loyalty among Gen Z consumers.

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Gen Z, a cohort characterized by their digital nativity and unique consumption patterns, places significant emphasis on diverse factors when engaging in online shopping, while not entirely dismissing the value of offline retail experiences. In both the pre-purchase and post-purchase phases, this cohort seeks active and dynamic interactions with other consumers, as well as the brands they prefer. Moreover, they are keen on deriving inspiration for purchases from the very platforms on which they spend a considerable portion of their time, such as social networks and content produced by influencers. Interactions with family and friends also play a crucial role in shaping their purchasing behavior, often occurring within these digital spheres.

It is incumbent upon brands to engage with their customer across various touchpoints, extending beyond the realm of social media. Given that offline shopping remains a relevant aspect of Gen Z's consumer habits, brands are expected to adopt an omnichannel strategy that enables customers to interact with and experience the brand in a multitude of ways.

Members of Gen Z harbor specific expectations regarding the products they purchase, including competitive pricing, design, quality, and discounts. Their preferences extend to both in-store and online shopping experiences, with the latter often occurring on retailers' proprietary websites. These platforms should be well-designed and facilitate a seamless customer journey. Additionally, social media platforms are witnessing a growing trend in shopping activities.

In conclusion, alongside fostering interactive dialogues, Gen Z consumers place a premium on convenience, as evidenced by their preference for accommodating return policies. Brands that want to appeal to this cohort must take these differentiated expectations into account and adapt their strategies accordingly.

### **Research Question 3**

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This study aimed to answer the RQ3 – *How can Brands adapt their strategy to the shift of needs in this generation?*

The findings showed that price is of utmost importance to this cohort and has a significant influence on their purchasing decisions. Although this may be partly due to their limited budgets as students, it is likely that price will continue to be a major factor in their purchasing decisions due to their high price sensitivity. Additionally, the survey revealed that brand loyalty is important to Gen Z, and they prefer to buy from specific brands. To effectively address Gen Z, brands must be aware of their needs and expectations and tailor their strategies accordingly. This study identified seven themes for brands to adapt their strategies to meet the needs of Gen Z: customer experience, omnichannel management, social media, influencer marketing, social commerce, brand awareness and loyalty, and price sensitivity. Further brand also has to take into account the attributes related directly to the product, the identified important attributes are product material, product quality, and delivery/return policies.

To succeed in today's digital age, brands must prioritize providing an excellent customer experience and adjust their strategies to cater to Gen Z's needs. This requires implementing various strategies such as omnichannel, social media, influencer marketing, and social commerce to build brand awareness and loyalty. Being transparent about expectations and flexible in their approach is also crucial for brands to remain relevant and offer the best customer experience.

Omnichannel management has become a vital component for catering to the needs and expectations of Gen Z as they grew up in a world where digitality is the norm, and a seamless shopping experience across online and offline channels is preferred. Brands need to prioritize processing online orders rapidly and effectively, providing convenient and hassle-free returns,

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as well as the flexibility to try on clothes in-store and have the purchased items delivered to the customer's preferred location.

Social media is an essential channel for brands to create awareness, promote brand loyalty, and foster a sense of community with their customers. Brands should also use social media to connect with customers at every stage of the buying process, including before, during, and after purchase.

Influencer marketing is an effective way to build trust and authenticity with Gen Z as they pay close attention to the opinions of their peers and influencers, they follow on social media. Brands must carefully select influencers that align with their target market and have a trustworthy and authentic image.

Social commerce is an emerging trend that offers brands another opportunity to connect with customers and build relationships. As Gen Z wants to be able to buy anywhere and anytime, brands must engage with social commerce to be ready for the features that it will offer in the future.

Brand loyalty and awareness are created by adapting the strategy to meet the needs of Gen Z. This can be achieved by being present on social media, using influencers, and social commerce to sell on platforms, creating further touchpoints with customers, and engaging in exchange.

Given that price sensitivity has been identified as the most crucial attribute, it is recommended that brands modify their marketing strategies to incorporate discounts and personalized rewards to entice and maintain Gen Z customers. By offering such incentives, brands can effectively

address the budgetary constraints that are of particular concern to Gen Z, and thereby enhance their overall appeal and competitiveness in the market. Such strategic adaptations are likely to facilitate increased brand engagement and loyalty among this demographic, ultimately leading to greater profitability and sustained success in the long term.

Moreover, the prominent factors associated with the product itself warrant careful consideration. The composition of the summer jacket's material assumes a significant role in the purchase decision-making process. The empirical investigations have revealed that the material composition exerts an influence on consumers' willingness to pay. Furthermore, product quality constitutes another pivotal determinant in the purchase decision. Additionally, as previously alluded to, the policies governing delivery and returns also wield considerable influence over the purchase decisions made by Generation Z, thereby underscoring their significance.

Overall, the findings of this study suggest that brands must adapt their strategies to meet the needs and expectations of Gen Z to attract and retain them as customers. The themes identified in this study can serve as a guideline for brands to effectively address this cohort and stay relevant in a constantly evolving market.

## **6.2 Managerial Implications**

As Gen Z continues to grow in significance for businesses, it is becoming increasingly crucial for marketers to tailor their products and services to cater to the special needs and preferences of this demographic. Marketers wanting to address Gen Z should primarily focus on the following attributes identified further within the discussion: customer experience, omnichannel management, social media, influencer marketing, social commerce, brand awareness and loyalty, and price sensitivity. For the Product itself, the brand has to take care of the following attributes: product material, product quality, and delivery/return policies.

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In the subsequent section, the researchers have documented and investigated proposals for modifying fashion brands' strategies.

The importance of an omnichannel strategy to cater to Gen Z cannot be overstated. This cohort's experiences and upbringing are fundamentally different from previous generations, such as the Baby Boomers or millennials. For this Generation, shopping should be easy, convenient, and frictionless. To adapt to the preferences of Gen Z consumers, brands can bridge the gap between online and offline shopping experiences by providing a seamless omnichannel experience.

The integration of a "click and go" option, allowing customers to place orders via digital channels and retrieve their purchases in brick-and-mortar stores, has emerged as a salient feature of contemporary retail practices. The popularity of this feature, particularly among Gen Z, has been evidenced by the results of the additional survey. Specifically, the survey revealed that a substantial majority of respondents belonging to Gen Z had availed themselves of this option, using it as a way to quickly obtain seasonal items, like summer jackets.

Brands that can provide an omnichannel experience that meets these expectations are well-positioned to attract and retain Gen Z customers.

The significance of social media in the digital age is well-established and has been acknowledged by most companies as an essential aspect of their marketing strategy. Social media platforms offer a wide range of content, from influencer collaborations to user-generated content, that can inspire and inform Gen Z consumers' fashion choices. In the context of the fashion industry, it is imperative for brands to have a strong presence on social networks in order to create awareness among potential customers. By effectively leveraging social media, companies can not only enhance their brand awareness but also cultivate brand loyalty and foster a deeper connection with customers. A sense of community can be established through

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social media interactions, which can lead to a lasting impression on customers. Additionally, social media provides a valuable opportunity for brands to engage with customers throughout the entire buying process, including before, during, and after the purchase. Customer service can be effectively provided through social media, enabling brands to build strong relationships with their customers.

Considering the significance of social media, companies must ensure that they establish authentic and trustworthy contact points with their customers, given the rapidly changing trends on social media platforms. Influencers play a vital role in providing inspiration to the target audience and can be seen as more credible and trustworthy than brands by Gen Z, as identified in theory. The researchers have revealed that when summer jackets fall slightly outside of a consumer's price range, the involvement of influencers can have a significant impact on the individual's willingness to spend more and their overall propensity to purchase. Accordingly, it is recommended that brands leverage the power of influencer marketing as a means of driving consumer engagement and facilitating purchase decisions. However, brands must ensure they select the appropriate influencers on the right platform, delivering the right message, to effectively leverage influencer marketing and reach Gen Z. In this manner, brands can effectively harness the power of influencers to drive consumer engagement and facilitate purchase decisions, particularly in relation to seasonal items such as summer jackets.

As the digital landscape continues to evolve, social commerce has emerged as a new and important avenue for brands to connect with their customers. Social Commerce presents an opportunity for companies to not only sell their products but also to establish a relationship with their customers.

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As previously noted, influencers have emerged as a powerful tool for facilitating consumer purchase decisions. By leveraging their social capital and influence, they can effectively sway consumer behavior and drive sales. However, it is also important to consider the role of social commerce in enhancing the accessibility of products and streamlining the purchase process.

By linking products directly to social media posts and incorporating social commerce functionalities, brands can reach their customers on their preferred social media platforms and effectively reduce barriers to purchase and increase the ease of access to their products. This strategy can be particularly effective in relation to influencer marketing, as it allows influencers to seamlessly incorporate product links and calls-to-action within their posts, thereby driving traffic and sales. Therefore, it is recommended that brands explore the potential of social commerce as a means of enhancing the accessibility of their products and improving the overall user experience.

Brand loyalty and awareness are essential for brands to establish a strong customer base and maintain their market position. These can be created by adapting the brand's marketing strategies to meet the needs and expectations of the target generation. In doing so, brands can establish multiple touchpoints with customers, enabling them to engage in a more meaningful exchange and strengthen the connection between the brand and the customer. Thus, companies should focus on developing strategies that address the needs and preferences of the target generation, as this is crucial to maintaining a loyal customer base and creating brand awareness.

To gain more loyalty from Gen Z consumers, brands can adopt the following strategies:

*Sustainability:* Brands can demonstrate a commitment to sustainability by using eco-friendly materials, reducing waste in the supply chain, or implementing recycling programs. Specifically, the survey revealed that H&M's "Close the Loop" campaign, which focuses on

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promoting sustainable fashion and reducing textile waste, was positively received by consumers when accompanied by price incentives.

*Transparency:* Brands can be transparent about their pricing strategy, supply chain, and manufacturing process, which can help build trust with Gen Z consumers who value authenticity and honesty. Providing clear explanations for pricing decisions and avoiding hidden fees can help increase transparency and build loyalty.

*Authenticity:* Brands can showcase their brand values and mission and engage with Gen Z consumers through authentic and meaningful communication. This could involve using social media platforms to engage with consumers, sharing user-generated content, and providing a personalized shopping experience.

Brands need to understand the factors that impact the purchasing decisions of Gen Z. This study has revealed that price is the most important attribute that Gen Z considers when making a purchase. To respond to the price sensitivity of Gen Z, brands could implement the following strategies:

1. *Offer competitive prices:* Brands can offer competitive prices to attract Gen Z consumers who prioritize cost savings. This could involve offering frequent promotions, discounts through influencers, or loyalty programs that provide tangible economic incentives to purchase. Specifically, these programs accumulate points with each purchase, which can then be redeemed for discounts or other rewards. Moreover, the survey suggests that incentivizing self-pickup options in order to save delivery fees can be an effective means of driving sales. Offering discounts or other incentives associated with self-pickup allows brands to motivate consumers making more frequent and larger purchases, while also encouraging repeat purchasing behavior.

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2. *Transparency in pricing*: Brands can be transparent about their pricing strategy, which can help build trust with Gen Z consumers who value authenticity and honesty. This could include displaying prices clearly on products, avoiding hidden fees, and providing clear explanations for pricing decisions.
3. *Quality assurance*: Brands can provide quality assurance by offering warranties, guarantees, or free returns, which can help alleviate the concerns of Gen Z consumers who are hesitant to make a purchase due to quality concerns.
4. *Limited edition and exclusivity*: Brands can create limited edition or exclusive products that appeal to Gen Z's desire for uniqueness and individuality. This can help justify higher prices and create a sense of exclusivity that Gen Z consumers are willing to pay for.
5. *Social responsibility*: Brands that demonstrate social responsibility and commitment to causes that Gen Z cares about, such as sustainability, can appeal to their values and justify higher prices.
6. *Price Range*: online retailers should especially offer jackets in the 30-75€ range, with jackets up to 150€ being also acceptable. Higher-priced jackets should only sparingly be offered as they currently address a niche consumer base, which could change once Gen Z becomes more financially stable. As females are more price-conscious, offering lower prices for female summer jackets could be beneficial.

Additionally, also the product material and the product quality needs to be taken into account when adapting a brand strategy. Consumers favor jackets made out of cotton due to their favorite product properties. Retailers should adopt a summer portfolio primarily comprised of cotton jackets but also offer a lean product portfolio of other materials.

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Aside from the jacket material, the quality of the jacket is also essential to consumers. Consumers prefer durable jackets that can be used for numerous years over "throw-away items", which aligns with their preference for sustainable items. Ideally, retailers should offer jackets of good quality, as due to the importance of price, it is not feasible to offer jackets with superb quality.

Consumers have a clear preference for black jackets, which is why these should make up the biggest part of the portfolio, with brown being the second most popular option. Green jackets are also interesting to include in the portfolio to a larger extent as they have the second biggest willingness to pay amongst consumers.

Due to the nature of online shopping, the delivery and return policy is a concern. Online shops should offer a few options in terms of speeds, as consumers may face occasions where for instance, they are heavily constrained by time. Concerning return policies, consumers prefer returns where they do not have to pay for shipping, as consumers are willing to pay a premium for this service. For retailers, however, it is essential to assess the return ratios for a product to identify the best option, as high returns could negate the effect of them paying a premium.

Overall, brands must be strategic in their approach to targeting Gen Z. By adapting their strategies to align with the needs and expectations of this cohort, brands can increase their brand loyalty and awareness, and ultimately drive sales.

### **6.3 Future Research**

The work inherits a range of limitations due to the nature of the design of the research instruments that were applied and the collected sample, which provide room for future research in this context.

A significant limitation of the work is that the research instruments covered only a narrow set of attributes. The jacket design was only covered on a surface level by including the jacket

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material and color. Considering that cotton jackets are preferred the most, future research could be, for instance, on the exact product design. Attributes that could be included in a further study could be:

1. Jacket closing: Zipper vs. buttons (incl. different zippers and button types)
2. Pockets: Availability of pockets and positioning of them
3. Coloring: unicolor vs. multi-colored vs. patterns vs. picture motives
4. Jacket Hood: Availability of a jacket hood
5. Jacket Cut: Overall cut of the jacket (regular/tailored/slim fit and jacket length)
6. Cuffs: Cuffs style (e.g., buttoned vs. folded)
7. Sleeves: Sleeve Length (long vs. short)

While the jacket functionality is addressed to a certain extent by the material used, it could also be beneficial to address the functional benefits specifically. Relevant could be, for instance, whether a jacket is water resistant, wind resistant, or offers UV protection.

Aside from characteristics that are purely of a design nature, a range of other factors could be considered. The impact of social proof could be addressed more extensively to see how Gen Z is impacted by various forms, such as reviews, user ratings, and recommendations from influencers or experts.

A limitation related to the pricing could be that the conducted conjoint survey had values considered “extreme”, such as the price tags of 150€ and above. As these price tags might be out of the financial scope of survey participants, this could have led participants to focus on the price to a much larger extent leading to an increased relative attribute importance of price. To test whether this is the case, another survey could be conducted with price points below 150€.

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Furthermore, attributes were, in some cases, potentially mapped with brands that are not known for these factors, which could cause these factors to be considered less critical. Shein, for instance, is considered to refrain from taking meaningful actions to reduce their environmental impact (Wolfe 2023), so participants subconsciously might not consider this an option when matched with sustainable materials.

The work highlighted that price, quality, and sustainability are significant consumer concerns. While high-quality (high life span) summer jackets could be mapped with low prices in the research environment, this is typically not the practice case, as brands charge for this added value to consumers. Furthermore, jackets using recycled materials could be more costly due to a complicated production process leading to higher production costs. As the work did not consider material costs (except for leather jackets being restricted from matching with 30€) and production costs, additional research should focus on the interplay of these three factors. It is essential to provide options that offer a financially feasible option for retailers while also matching the price-conscious needs of Gen Z.

Another limitation of the conducted surveys is their left-tailed age distribution. As younger individuals belonging to Gen Z are currently as young as eleven, it would be beneficial to conduct a similar study in a few years. Additional research would first allow also to consider these younger individuals and check whether there are differences to older individuals that belong to Gen Z, as inter-generation differences could be a possibility. Furthermore, this subsequent study can also help to understand whether Gen Z's currently high price consciousness is driven by their limited financial means.

The attitude-behavior gap is another significant limitation to consider in this work, as the constructed surveys are concerned with the consumers' attitudes towards a product or brand in an environment where decisions have no real-life implications. This could lead participants to favor factors such as sustainability or to actively not choose a retailer due to their brand image.

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However, due to the decision's financial impact, these considerations might be less critical in their day-to-day life. Shein could, for instance, be heavily impacted by this limitation and perceived differently in Gen Z's daily life. Future research in this area could specifically focus on online retailer brand images, which includes, on the one hand, a detailed analysis of their environmental impact and whether they operate ethically and, on the other hand, a detailed analysis of where consumers tend to shop. Conducting research in this area would contribute to the attitude-behavior gap and the analysis of the deep causes of why consumers might dislike certain brands. Aside from the attitude-behavior gap, this research could provide an overview of factors that positively influence the brands' image and which erode the brand image.

The researchers additionally noted that social media and social commerce play an essential role in the life of Gen Z. These factors were, however, not extensively addressed by the applied research instruments. While influencers were identified as a significant source of inspiration, the work does not outline the kind of content that consumers want to see from them. Fashion and styling advice could be a more significant driver than product reviews in fashion and jackets. Additionally, the research does not provide insights into how Gen Z perceives sponsored content by influencers, which could be deemed unauthentic. It would be beneficial to research which kind of content Gen Z prefers and which is most persuasive.

Furthermore, as mobile devices continue to be increasingly prevalent in consumers' daily lives, future research could focus on identifying the importance of mobile shopping apps in the customer journey. Future research can provide valuable insights into the design and functionality to ensure meeting the evolving needs and expectations of Gen Z. Through this research, the effectiveness of specific features and design elements of mobile shopping apps can be examined to drive customer engagement, loyalty, and satisfaction. Based on the findings, retailers can optimize their mobile shopping apps to enhance customer experience and gain a competitive advantage in the new retail world. In addition to mobile shopping apps,

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there is a need for future research to investigate other digital touchpoints that are relevant for Gen Z consumers, such as in-store technologies and the potential of developing stores of the future. This could involve analyzing the impact of digital technologies on the in-store experience and identifying the key design and functional elements that are most effective in enhancing the customer experience.

The researchers also noted conflicting information. While Gen Z is said to be focused on sustainability, as indicated in their preference for recycled materials, participants did not prefer sustainable delivery options (CO<sub>2</sub>-neutral delivery) with the same delivery time as the non-eco-friendly option. Future research could help understand whether this observation is correct or whether it is a statistical error.

As the research solely focused on fast-fashion retailers, the findings could be enriched by considering brands operating in the slow-fashion segment. Consumers might value factors such as sustainability much higher when buying from slow-fashion brands, as the claims are perceived as more authentic than those from fast-fashion brands. Furthermore, consumers could be less price-conscious when shopping at those brands.

The researchers believe strongly that addressing these areas can enhance the understanding of this new generation even more and provide further guidance on how brands can adapt their strategies to Gen Z's needs.

Considering the promising results generated through the application of ChatGPT, the researchers believe that it would be interesting to conduct more substantial research in this area in the future. Once ChatGPT can draw live data from the web, results could become even more accurate. Depending on the result accuracy, it might be possible to increasingly rely on this tool and increase the productivity of researchers and marketers by allowing them to focus more on providing recommendations rather than conducting tedious studies.

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Table 1 Consumer Interviews: Script for Online Shoppers

Category	Questions
<b>Usage</b>	<p>Are you actively buying fashion products online or directly at the store?</p> <p>How frequently do you shop online?</p> <p>Have you bought a jacket online yet, if not what kind of products do you typically buy?</p> <p>Which online retailers (multiple possible) do you use to buy/look for jackets (fashion) online?</p>
<b>Attributes</b>	<p>What would you say are the main reasons for you to buy jackets (fashion) online?</p> <p>Could you please rank these factors according to their importance to you?</p> <p>What are you looking for in jackets (fashion) in terms of specific features or qualities?</p> <p>Could you please rank these attributes according to their importance to you?</p>
<b>Preferences</b>	<p>From which retailer (just one) do you typically buy jackets (fashion) online?</p> <p>How often do you buy from this online retailer?</p> <p>Why do you choose this online retailer over others?</p>
<b>Improvement Points</b>	<p>Could you please rate your last online shopping experience on a scale from 1 to 10 where 1 is considered awful and 10 excellent?</p> <p>Could you please also give us a short justification for providing this rating?</p> <p>What are major deal breakers for you when shopping for jackets (fashion) online?</p> <p>Do you have other recommendations for brands which would lead you to buy more products at their online shop?</p>
<b>Demographics</b>	<p>What is your age?</p>

	<p>What gender do you identify with?</p> <p>What is your current professional status?</p>
--	---

*Table 2 Consumer Interview: Script for Offline Shoppers*

<b>Category</b>	<b>Questions</b>
<b>Usage</b>	<p>Are you actively buying fashion products online or directly at the store?</p> <p>What are the main reasons why you have decided not to buy fashion online and continue to buy them directly at the store?</p> <p>Could you please rank them in order of importance to you personally?</p>
<b>Attributes</b>	<p>What are you looking for in jackets in terms of specific features or qualities?</p> <p>Could you please rank these attributes according to their importance to you?</p>
<b>Preferences</b>	<p>From which stores do you typically buy jackets?</p> <p>Why do you choose these stores over others?</p>
<b>Improvement Points</b>	<p>Have you had bad online shopping experiences in the past or been impacted by someone else that did? If yes, could you please provide some insights on this experience?</p> <p>Can you think of any changes online retailers could implement to make you consider buying products online?</p>
<b>Demographics</b>	<p>What is your age?</p> <p>What gender do you identify with?</p> <p>What is your current professional status?</p>

Table 3 Consumer Interviews: Demographics Category

Interviewee	1	2	3	4	5	6	7	8	9	10
<b>Age</b>	24	24	22	25	24	23	23	24	23	22
<b>Birth year</b>	1998	1999	2000	1997	1999	2000	2000	1999	1999	2000
<b>Gender (F/M)</b>	F	M	M	F	F	F	F	F	F	F
<b>Professional Status</b>	Full Time (IT)	Student	Student	Full time employed	Student	Full time (Engineer)	Student	Student	Student	Student

Table 4 Consumer Interviews: Usage Category

Interviewee	1	2	3	4	5	6	7	8	9	10
<b>Online Shopper</b>	Yes	Yes	Yes	Yes	Yes	Yes	Prefers stores - also shops online	Prefers stores - also shops online	Yes (Pref.) – also in-store	Yes (Pref.) – also in-store
<b>Frequency</b>	Every 1-2 months	Every 3-4 months	Every 2-3 months	Biweekly	Once every 1-3	Once every 3-4 months	Once every 3 months	3 times a year	Every 3 months	Biweekly
<b>Jacket bought online?</b>	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes
<b>Platform used</b>	Shein H&M Deichmann Pimkie Amazon Zalando	Motorcycle Louis Motorcycle H&M	ASOS	ASOS Zara	Mango Zara	Inditex Brownie Instagram Shops	ASOS Breuninger Zara	ASOS Nike Zara NA-KD	ASOS YesStyl e Influencer Recommendations	Zara Mango

Table 5 Consumer Interviews: Attributes Category - Ranking factors for Online Shopping (Raw Data)

Interviewee	Factors in order of Importance					
1	Convenience (Free Shipping + Return)	Cheaper Price	Product Range	Better Overview	Less time consuming	Shops uncomfortable
2	Convenience	Price Comparison	Product Availability	Discounts	Product Range	
3	Convenience (Return & Ordering)	Product Range (Exclusives)				
4	Product Range	Convenience (Flexibility)	Time saving			
5	Better Overview	Convenience				
6	Need for new item	Keep up to date with trends				
7	Store not in proximity					
8	Exclusively sold online	Secure limited collection item	Sales			
9	Convenience (Faster)	Product comparison	Price comparison			
10	Convenience	Better Overview	Online Discounts			

Table 6 Consumer Interviews: Attributes Category – Ranking factors for Online Shopping (Analyzed)

Dimension	Factors included	# Mentions	Ranks	Avg. Rank
<b>Convenience</b>	<ul style="list-style-type: none"> <li>- Free shipping &amp; Return</li> <li>- Ordering</li> <li>- Faster</li> <li>- Flexibility to order from anywhere/anytime</li> </ul>	7	1, 1, 1, 2, 2, 1, 1	1.3
<b>Product Range</b>	<ul style="list-style-type: none"> <li>- Product Range</li> <li>- Exclusives (Online)</li> </ul>	5	3, 5, 2, 1, 1,	2.4
<b>Price</b>	<ul style="list-style-type: none"> <li>- Cheaper Price</li> <li>- Price Comparison</li> <li>- Sales</li> <li>- Online Discounts</li> </ul>	5	2, 2, 3, 3, 3	2.6
<b>Better Overview</b>	<ul style="list-style-type: none"> <li>- Better Overview</li> <li>- Product Comparison</li> </ul>	4	4, 1, 2, 2	2.3
<b>Product Availability</b>	<ul style="list-style-type: none"> <li>- Product availability</li> </ul>	2	3, 2	2,5

	- Secure limited edition item (offered online/offline)			
<b>Need for new item</b>	- Need for new item	1	1	1
<b>No store in proximity</b>	- No store in proximity	1	1	1
<b>Fashion trends</b>	- Keep up with fashion trends	1	2	2
<b>Shops uncomfortable</b>	- Shops are uncomfortable (e.g., too warm)	1	6	6

Table 7 Consumer Interviews: Attributes Category - Qualities Jackets (Raw Data)

Interviewee	Factors in order of Importance						
<b>1</b>	Model	Price	Suitability for the season	Material			
<b>2</b>	Price	Material & Fabric	Quality	Color	Style	Jacket with hood	Jacket Brand
<b>3</b>	Quality	Durability	Style	Functionality	Availability of product		
<b>4</b>	Comfort	Quality & Fabric	Uniqueness				
<b>5</b>	Size	Price	Material	Color	Jacket Type		
<b>6</b>	Effectiveness	Comfort					
<b>7</b>	Price	Material	Size	Jacket Type			
<b>8</b>	Quality	Price	Color	Material			
<b>9</b>	Quality & Durability	Price	Sustainable				
<b>10</b>	Quality & Durability	Price	Versatile Usage				

Table 8 Consumer Interviews: Attributes Category - Qualities Jackets (Analyzed)

Dimension	Factors included	# Mentions	Ranks	Avg. Rank
<b>Price</b>	- Price	7	2,1, 2, 1, 2, 2, 2	1.7
<b>Material</b>	- Material - Material & Fabric	6	4, 2, 2, 3, 2, 4	2.8
<b>Quality</b>	- Quality - Durability	5	3, 1, 1, 1, 1	1.4
<b>Model</b>	- Model - Style - Uniqueness	4	1, 5, 3, 3	3

<b>Suitability for Season</b>	– Suitability for Season – Effectiveness – Functionality	3	3, 4, 1	2.7
<b>Color</b>	– Color	3	4, 4, 3	3.7
<b>Jacket Type</b>	– Jacket Type – Jacket with Hood	3	6, 5, 4	5
<b>Size</b>	– Size	2	1, 3	2
<b>Comfort</b>	– Comfort	2	1,2	1.5
<b>Sustainability</b>	– Sustainable	1	3	3
<b>Versatility</b>	– Versatile Usage	1	3	3
<b>Availability</b>	– Product Availability	1	5	5
<b>Jacket Brand</b>	– Jacket Brand	1	7	7

Table 9 Consumer Interviews: Preferences Category – Comparison Preferred Shop to Online Shopping Frequency

<b>Interviewee</b>	<b>Frequency Online shopping [All Shops]</b>	<b>Frequency Online Shopping [Preferred Shop]</b>	<b>Comparison Frequency Preferred to All Shops</b>
<b>1</b>	Every 1-2 months	Every 1-2 months	<b>Same Frequency</b>
<b>2</b>	Every 3-4 months	Every 3-4 months	<b>Same Frequency</b>
<b>3</b>	Every 2-3 months	More often than other shops	<b>Too ambiguous answer to draw conclusion</b>
<b>4</b>	Biweekly	Biweekly	<b>Same Frequency</b>
<b>5</b>	Once every 1-3 months - differs heavily	Once every 6 months	<b>Lower Frequency</b>
<b>6</b>	Once every 3-4 months	Every year	<b>Lower Frequency</b>
<b>7</b>	Once every 3 months	1-2 times a year	<b>Lower Frequency</b>
<b>8</b>	3 times a year	1-2 times a year	<b>Lower Frequency</b>
<b>9</b>	Every 3 months	1-2 times a year	<b>Lower Frequency</b>
<b>10</b>	Biweekly	Biweekly	<b>Same Frequency</b>

Table 10 Consumer Interviews: Preference Category - Reason for it being a preferred shop with amount of mentioning's

<b>Dimension</b>	<b>Factors included</b>
<b>Pricing (6)</b>	<ul style="list-style-type: none"> <li>- Cheap Prices (3)</li> <li>- Good Price/Value Ratio (2)</li> <li>- Special Deals (1)</li> </ul>
<b>Shipping (3)</b>	<ul style="list-style-type: none"> <li>- Free shipping (2)</li> <li>- Fast delivery (1)</li> </ul>
<b>Return Policy (2)</b>	<ul style="list-style-type: none"> <li>- 45 Days Return (1)</li> <li>- Free return (1)</li> </ul>
<b>Membership/Loyalty Programs (2)</b>	<ul style="list-style-type: none"> <li>- Loyalty Points for Discounts (1)</li> <li>- Premium membership – next day delivery (1)</li> </ul>
<b>Platform specific features (2)</b>	<ul style="list-style-type: none"> <li>- Simple to use (1)</li> <li>- Price Comparison (1)</li> </ul>
<b>Offering (13)</b>	<ul style="list-style-type: none"> <li>- Big Product Range (5)</li> <li>- Large size specific offering – petite (1)</li> <li>- Large amount of product categories (1)</li> <li>- Great Quality (2)</li> <li>- Favorite brands (1)</li> <li>- Style/Taste (2)</li> <li>- Preference for their products (1)</li> </ul>

Table 11 Perceptual Map: Survey Design

Section	Description	Question	Answer
Section 1	Determine whether the participant corresponds to our study	1. Are you part of Gen Z? (1997-2012)	1. Yes 2. No (If "no", survey will not appear)
		2. From all the brands shown under, do you know at least one?	2.1. Which (Choose all the brands you know)? 1. Zara 2. Mango 3. Shein 4. ASOS 5. H&M
		3. From all the brands shown under, did you consumed at least one? / Of the brands shown above, have you ever consumed any of them?	3.1. Which (Choose all the brands you have consumed)? 1. Zara 2. Mango 3. Shein 4. ASOS 5. H&M
Section 2	Importance of the attributes for the consumer when buying jackets	4. From the following attributes rate (from 1 to 5, being 1 not important and 5 very important) the importance of each of them when buying jackets in this Brands: 1. Zara 2. Mango 3. Shein 4. ASOS 5. H&M 4.1. Brand (Overall position and image of a brand) 4.2. Price (Product price) 4.3. Discounts (Whether it matters if the product is in promotion or not) 4.4. Quality (The items overall quality and conditions) 4.5. Design (Fits, quality and overall jacket aesthetics) 4.6. Uniqueness (of materials) 4.7. Sustainability (of materials) 4.8. Gender Association (Feminine or masculine associations) 4.9. Shipping Costs 4.10. Delivery Time 4.11. Return Policy	Rate on a scale from 1 to 5 where 1-Extremely unimportant and 5-Extremely important
Section 3	Determine the frequency distribution on the collected sample	5. How frequently do you shop online?	1. At least once a week 2. Once every 2 weeks 3. Once every 1-3 months 4. once every 4-6 months 5. once a year Choose one option
	Determine the channel	6. If you shop online, On which channel do you make your online purchases?	1. Retailer websites (e.g., Nordstrom, Zara) 2. Online marketplaces (e.g., Amazon, eBay) 3. Fashion-specific marketplaces (e.g., ASOS, Farfetch) 4. Social media shopping (e.g., Instagram, Facebook) 5. Outlet store websites (e.g., Saks Off 5th, Nordstrom Rack) Multiple selection possible
	Assess who influenced the consumer to buy fashion online	7. Who do you feel that influences you the most before purchasing?	1. Family 2. Friends 3. Influencers 4. Celebrities Rate on a scale from 1 to 5, where 1=Not normal and 5=Really normal
	Assess in which situations the consumer feel inspired to buy fashion online	8. Where do you feel inspired to shop fashion online?	1. Instagram 2. TikTok 3. Facebook 4. Pinterest 5. Radio/TV Rate on a scale from 1 to 5, where 1=Not normal and 5=Really normal
	Assess where consumers buy clothes	9. Where do you buy clothes?	1. Only Online 2. Only In-store 3. Both Choose one option
	Assess the motivation of the users that drive them to shop in-store	10. What are the drivers to make you shop in-store?	1. Immediate product availability 2. Predictability of fit/sizes 3. Social Experience (Shopping with friends) 4. Personal Customer Service 5. Easier to test the quality of the item 6. I don't shop in-store Multiple selection possible
Section 4	Analyze the demographics features of the collected sample	11. What is your gender?	1. Male 2. Female 3. Others 4. Prefer not to disclose
		12. What is your age?	1. 11-14 2. 15-18 3. 19-22 4. 23-25
		13. What is the highest education you have completed?	1. Less than High School 2. High School Diploma 3. Bachelor's degree 4. Master's degree 5. MBA/PhD
		14. What is your current professional status?	1. Student 2. Part-Time Employed 3. Full-Time employed 4. None of the above (e.g., job seeking)
		15. Where are you from?	Insert the Country

Table 12 Conjoint Analysis: Survey Construction - Rationale behind the inclusion of Zara, ASOS, Shein, Mango and H&M (Similiarweb LTD 2023, Mareicheva 2022)

Brand	Rationale
<b>Zara</b>	<ul style="list-style-type: none"> <li>Most mentioned across preliminary interviews</li> <li>Most popular brand in Portugal – likely a lot of respondents considering the researchers backgrounds (Similiarweb LTD 2023)</li> </ul>
<b>ASOS</b>	<ul style="list-style-type: none"> <li>Most mentioned across preliminary interviews</li> <li>Consideration as “Best Instagram Store” (Mareicheva 2022) – which makes it interesting due to Gen-Z’s social media activity and that some participants are attracted by Instagram stores</li> <li>Seventh most popular online fashion shop</li> </ul>
<b>Mango</b>	<ul style="list-style-type: none"> <li>Third most mentioned across the interviews</li> <li>Globally Recognized brand</li> </ul>
<b>H&amp;M</b>	<ul style="list-style-type: none"> <li>Third most mentioned across the interviews</li> <li>Globally third most accessed online store (Similiarweb LTD 2023)</li> </ul>

<b>Shein</b>	<ul style="list-style-type: none"> <li>– Second most popular online store in Portugal (Similiarweb LTD 2023)</li> <li>– Globally most accessed online store (Similiarweb LTD 2023)</li> </ul>
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Table 13 Conjoint Analysis: Survey Design - Prices of Online Shops by Material in € (Based on prices as of 26/03/2023)

<b>Retailer</b>	<b>Price Level</b>	<b>Cotton</b>	<b>Leather</b>	<b>Wool</b>	<b>Fleece</b>	<b>Polyester</b>	<b>Synthetic Leather</b>
<b>H&amp;M</b>	Min price	29.99	159	49.99	29.99	n.a.	69.99
	Max Price	229	899	279	69	n.a.	169
<b>ASOS</b>	Min price	10	67.5	19.25	18	30	21.99
	Max Price	220.99	499	333.99	258	329.9	155.5
<b>Shein</b>	Min price	6.5	n.a.	11	6	3	9
	Max Price	59.99	n.a.	32.49	66.49	171.49	59.49
<b>Mango</b>	Min price	29.99	179.99	29.99	29.99	22.99	49.99
	Max Price	149.99	359.99	89.99	29.99	119.99	99.99
<b>Zara</b>	Min price	59.95	129	129	79.95	25	49.95
	Max Price	59.95	179	129	79.95	279	99.95

Table 14 Perceptual Map: Respondent counts by status

<b>Status</b>	<b>Included/ Excluded</b>	<b>Number of Observations (n)</b>	<b>% of total</b>
<b>Completed Survey</b>	Included	231	23.1%
<b>Disqualified – Incomplete Survey</b>	Excluded	1	0.1%
<b>Send Survey but did not complete</b>	Excluded	768	76.8%
<b>Total</b>		1000	100,00%

Table 15 Perceptual Map: Sample Geographical Distribution (n=215)

<b>Country</b>	<b>Sample distribution</b>
<b>Germany</b>	61.04%
<b>Portugal</b>	29.44%
<b>Brazil</b>	2.60%
<b>Italy</b>	1.73%
<b>Austria</b>	1.73%
<b>Denmark</b>	0.87%
<b>China</b>	0.87%
<b>Belgium</b>	0.43%
<b>Ireland</b>	0.43%
<b>Tailand</b>	0.43%

<b>United States</b>	0.43%
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Table 16 Perceptual Map: Sample Gender Distribution (n=215)

<b>Gender</b>	<b>Sample distribution</b>
<b>Female</b>	50.70%
<b>Male</b>	43.72%
<b>Others</b>	2.79%
<b>Prefer to not disclose</b>	2.79%

Table 17 Perceptual Map: Sample Education Distribution (n=215)

<b>Education</b>	<b>Sample distribution</b>
<b>Less Than High School</b>	10.70%
<b>High School Diploma</b>	35.35%
<b>Bachelor's Degree</b>	40.00%
<b>Master's Degree</b>	13.49%
<b>MBA/PHD</b>	0.47%

Table 18 Perceptual Map: Sample Professional Status Distribution (n=215)

<b>Professional Status</b>	<b>Sample distribution</b>
<b>Student</b>	79.07%
<b>Part-Time Employed</b>	4.19%
<b>Full-Time Employed</b>	13.95%
<b>None of the above</b>	2.79%

Table 19 Perceptual Map: Total Variance Explained

### **Total Variance Explained**

<b>Component</b>	<b>Extraction Sums of Squared Loadings</b>		
	<b>Total</b>	<b>% of Variance</b>	<b>Cumulative %</b>
<b>1</b>	<b>5.563</b>	<b>50.572</b>	<b>50.572</b>
<b>2</b>	<b>4.657</b>	<b>42.339</b>	<b>92.911</b>

**Extraction Method: Principal Component Analysis.**

Table 20 Perceptual Map: Correlation between the different Attributes

**Correlation Matrix<sup>a</sup>**

	Brand.Reputation	Price	Discounts	Quality.Materials	Design	Uniqueness	Sustainability	Gender.Association	Shipping.Cost	Delivery.Time	Return.Policy	
Correlation	1.000	-.729	-.714	.786	-.117	.770	-.084	-.211	-.775	-.740	-.938	
Brand.Reputation		1.000	.933	-.911	-.498	-.880	-.530	-.178	.210	.478	.450	
Price			1.000	-.910	-.540	-.847	-.611	-.278	.131	.264	.465	
Discounts				1.000	.513	.991	.512	.389	-.242	-.346	-.550	
Quality.Materials					1.000	.498	.983	.863	.705	.471	.422	
Design						1.000	.472	.411	-.257	-.365	-.540	
Uniqueness							1.000	.797	.693	.471	.386	
Sustainability								1.000	.677	.661	.402	
Gender.Association									1.000	.861	.913	
Shipping.Cost										1.000	.740	
Delivery.Time											1.000	
Return.Policy												1.000

a. This matrix is not positive definite.

Table 21 Perceptual Map: Component Score Coefficient Matrix

**Component Score Coefficient Matrix**

	Component	
	1	2
Brand.Reputation	-.165	-.079
Price	.166	-.049
Discounts	.161	-.068
Quality.Materials	-.172	.058
Design	-.049	.205
Uniqueness	-.168	.055
Sustainability	-.053	.201
Gender.Association	-.017	.193
Shipping.Cost	.087	.186
Delivery.Time	.105	.152
Return.Policy	.131	.132

Extraction Method: Principal Component Analysis.  
Component Scores.

Table 22 Conjoint Analysis: Respondent counts by status

Status	Included/ Excluded	Number of Observations (n)	% of total
Completed Survey	Included	322	29.51%
Completed (Low Quality) – Average time taken for Conjoint Set was too short	Excluded	1	0.09%
Completed (Low Quality) – Time on some conjoint sets was too low	Excluded	1	0.09%
Completed (Low Quality) – Did not look through all alternatives	Excluded	18	1.65%
Completed (Low Quality) – Did not move the mouse enough	Excluded	1	0.09%
Disqualified – Same IP Address	Excluded	2	0.18%
Disqualified – Incomplete Survey	Excluded	1	0.09%
Opened Survey but did not complete survey	Excluded	745	68.29%
<b>Total</b>		<b>1,091</b>	<b>100.00%</b>

Table 23 Conjoint Analysis: Sample Geographical Distribution (n=158)

Country	Sample distribution
Germany	74.05%
Indonesia	7.59%
Portugal	7.59%
United States	4.43%
Austria	0.63%
Belgium	0.63%
Czech Republic	0.63%
Denmark	0.63%
Ireland	0.63%
Netherlands	0.63%
Poland	0.63%
Romania	0.63%
Singapore	0.63%
United Kingdom	0.63%

Table 24 Conjoint Analysis: Online Shopping Frequency 95% Confidence Interval (How often do you shop online for fashion?)

Frequency	Lower Limit [95% CI]	Sample Mean	Upper Limit [95% CI]
Once every week	0.6%	2.5%	4.7%
Once every 2 weeks	6.8%	10.2%	14.3%
Once every 1-3 months	38.0%	44.7%	51.1%
Once every 4-6 months	19.3%	24.5%	30.1%
Once a year	13.0%	18.0%	22.8%

Table 25 Conjoint Analysis: Brand Awareness at 95% Confidence Interval (Do you know the following brands?)

Brand	Lower Limit [95% CI]	Sample Mean	Upper Limit [95% CI]
H&M	96.3%	98.1%	99.7%
Zara	91.9%	94.7%	97.2%
Shein	78.1%	82.6%	87.0%
ASOS	73.3%	78.3%	82.9%
Mango	72.2%	77.3%	82.5%
None of the listed brands	0.0%	0.3%	1.2%

Table 26 Conjoint Analysis: Ratio of respondents that have bought from a brand assuming they recognized the brand

<b>Brand</b>	<b>Do you know the brand?</b>	<b>Have you already purchased from the brand?</b>	<b>% of respondents that have purchased from the brand if they recognized the brand</b>
<b>H&amp;M</b>	98.1%	88.5%	90.2%
<b>Zara</b>	94.7%	67.1%	70.9%
<b>Shein</b>	82.6%	25.2%	30.5%
<b>Asos</b>	78.3%	41.9%	53.5%
<b>Mango</b>	77.3%	43.5%	56.3%

Table 27 Conjoint Analysis: Relative Importance of Attributes with 95% confidence interval in order of importance

<b>Attribute</b>	<b>Lower Limit [95% CI]</b>	<b>Sample Mean Part-Worths</b>	<b>Upper Limit [95% CI]</b>
<b>Price</b>	27.1%	28.5%	30.0%
<b>Online Retailer</b>	18.8%	19.7%	20.7%
<b>Jacket Material</b>	14.2%	14.8%	15.6%
<b>Jacket Color</b>	12.4%	13.2%	14.0%
<b>Minimum Lifespan</b>	7.5%	7.9%	8.3%
<b>Delivery</b>	6.4%	6.7%	7.0%
<b>Sustainability</b>	4.6%	5.1%	5.6%
<b>Return Policy</b>	3.8%	4.1%	4.3%

Table 28 Conjoint Analysis: Relative importance of Utility Levels with 95% Confidence Interval for the average consumer

Attribute	Levels	Lower [95% CI]	Limit	Sample Mean Part-Worths	Upper [95% CI]	Limit
<b>Online Retailer</b>	ASOS	6.2%		6.6%	7.1%	
	Zara	3.4%		4.4%	5.4%	
	H&M	0.9%		1.7%	2.5%	
	Mango	5.2%		5.9%	6.7%	
	Shein	-20.0%		-18.7%	-17.3%	
<b>Jacket Material</b>	Cotton	6.4%		7.2%	8.0%	
	Authentic Leather	-5.1%		-4.1%	-2.9%	
	Wool	-0.5%		0.6%	1.8%	
	Fleece	-0.6%		0.1%	0.8%	
	Polyester	-2.4%		-2.4%	-1.7%	
	Synthetic Leather	-1.5%		-1.5%	-0.3%	
<b>Sustainability</b>	Recycled Materials	2.5%		3.0%	3.4%	
	Non-Recycled Materials	-3.4%		-3.0%	-2.5%	
<b>Jacket Color Palette</b>	Brown	-0.7%		-0.3%	0.2%	
	Black	3.3%		4.4%	5.7%	
	White	-4.1%		-3.1%	-2.0%	
	Blue	-1.4%		-0.6%	0.3%	
	Green	-1.6%		-0.5%	0.4%	
<b>Jacket Lifespan</b>	<b>Minimum</b> 2-3 Years	-4.5%		-4.1%	-3.7%	
	4-5 Years	-3.1%		-2.5%	-1.9%	
	6-7 Years	0.5%		0.9%	1.4%	
	8-9 Years	2.3%		2.8%	3.3%	
	10 Years	2.3%		2.9%	3.4%	
<b>Delivery</b>	Same-Day	-1.4%		-1.0%	-0.5%	
	Next-Day	0.3%		0.7%	1.0%	
	Standard (3-5 days)	0.1%		0.6%	1.1%	
	Economy (6-7 days)	0.1%		0.5%	1.0%	
	CO2 neutral delivery (3-5 days)	-1.4%		-0.8%	-0.2%	
<b>Return Policy</b>	30 days free return (drop off at post office)	0.6%		0.9%	1.1%	
	30 days free return (pickup at house)	-0.3%		0.1%	0.5%	
	30 days return (5€ shipping cost)	-1.4%		-1.0%	-0.6%	
<b>Price</b>	30€	16.1%		17.5%	18.9%	
	50€	14.2%		15.5%	16,8%	
	75€	11.2%		12.0%	12.7%	
	100€	4.9%		5.8%	6.6%	
	150 €	-0.4%		0.1%	0.8%	
	200€	-10.4%		-9.6%	-8.7%	
	250€	-20.5%		-19.4%	-18.3%	
300€	-23.0%		-22.0%	-20.8%		

Table 29 Conjoint Analysis: Correlation price and Preference (Pearson-Coefficient)

		Preference	Price
Preference	Pearson Correlation	1	-,994**
	Sig. (2-tailed)		< ,001
	N	8	8
Price	Pearson Correlation	-,994**	1
	Sig. (2-tailed)	< ,001	
	N	8	8

\*\* Correlation is significant at the 0.01 level (2-tailed).

Table 30 Conjoint Analysis: Impact of Gender - Relative Attribute Importance by Gender

Gender	Average of Price	Average of Online Retailer	Average of Jacket Material	Average of Jacket Color	Average of Minimum Lifespan	Average of Delivery	Average of Sustainability	Average of Return Policy
<b>Female (n=196)</b>	29.4733%	20.3888%	14.3868%	12.6016%	7.8968%	6.4778%	4.8444%	3.9305%
<b>Male (n=114)</b>	26.9108%	18.6876%	15.5074%	14.1617%	8.0344%	6.9846%	5.4111%	4.3023%
<b>Others (n=8)</b>	28.8367%	17.2696%	16.0793%	12.4560%	7.9817%	6.8198%	6.2110%	4.3459%
<b>Prefer to not disclose (n=4)</b>	29.3222%	17.5529%	15.9795%	15.8648%	5.4750%	7.1071%	4.7370%	3.9616%
<b>Total (n=322)</b>	<b>28.5484%</b>	<b>19.6738%</b>	<b>14.8454%</b>	<b>13.1909%</b>	<b>7.9175%</b>	<b>6.6736%</b>	<b>5.0777%</b>	<b>4.0728%</b>

Table 31 Conjoint Analysis: Impact of Gender - ANOVA of the relative attribute importance of attributes, gender

		Sum of Squares	df	Mean Square	F	Sig.
<b>Online Retailer</b>	Between Groups	208.590	1	208.590	3.959	.048
	Within Groups	16227.366	308	52.686		
	Total	16435.956	309			
<b>Jacket Material</b>	Between Groups	90.515	1	90.515	3.125	.078
	Within Groups	8922.511	308	28.969		
	Total	9013.026	309			
<b>Sustainability</b>	Between Groups	23.154	1	23.154	1.695	.194
	Within Groups	4206.424	308	13.657		
	Total	4229.578	309			
<b>Jacket Color</b>	Between Groups	175.427	1	175.427	4.293	.039
	Within Groups	12586.046	308	40.864		
	Total	12761.473	309			
<b>Minimum Lifespan</b>	Between Groups	1.366	1	1.366	.143	.705
	Within Groups	2935.664	308	9.531		
	Total	2937.030	309			
<b>Delivery</b>	Between Groups	18.507	1	18.507	2.879	.091
	Within Groups	1979.810	308	6.428		
	Total	1998.317	309			
<b>Return Policy</b>	Between Groups	9.961	1	9.961	1.975	.161
	Within Groups	1553.743	308	5.045		
	Total	1563.704	309			
<b>Price</b>	Between Groups	473.278	1	473.278	3.996	.046
	Within Groups	36475.462	308	118.427		
	Total	36948.739	309			

Table 32 Conjoint Analysis: Impact of Gender - Gender Crosstab: Online Retailer Levels

Attribute	Level	Female (N = 196)	Male (N = 114)	Range
Online Retailer	ASOS	6.0%	7.6%	1.6%
Online Retailer	Zara	5.0%	3.9%	1.1%
Online Retailer	H&M	1.9%	1.2%	0.7%
Online Retailer	Mango	6.6%	4.6%	2.0%
Online Retailer	Shein	-19.4%	-17.2%	2.2%

Table 33 Conjoint Analysis: Impact of Gender - Gender Crosstab: Price Levels

Attribute	Level	Female (N = 196)	Male (N = 114)	Range
Price	30 €	17.8%	16.0%	1.8%
Price	50 €	16.2%	13.7%	2.6%
Price	75 €	12.6%	10.8%	1.8%
Price	100 €	5.8%	5.8%	0.0%
Price	150 €	-0.6%	1.5%	2.1%
Price	200 €	-9.9%	-8.7%	1.2%
Price	250 €	-19.5%	-18.6%	0.9%
Price	300 €	-22.4%	-20.4%	2.0%

Table 34 Conjoint Analysis: Impact of Gender - Gender Crosstab: Jacket Colors

Attribute	Level	Female (N = 196)	Male (N = 114)	Range
Jacket Color	Brown	0.1%	-1.0%	1.1%
Jacket Color	Black	3.3%	6.4%	3.1%
Jacket Color	White	-2.1%	-4.6%	2.4%
Jacket Color	Blue	-1.1%	0.6%	1.8%
Jacket Color	Green	-0.2%	-1.5%	1.3%

Table 35 Conjoint Analysis: Segmentation – Attribute Importance by Segment

	Overall	The Frugals (n=142)	Color Enthusiasts (n=77)	Material Matters (n=54)	Brand Loyalists (n=49)
<b>Price</b>	28.5%	<b>37.5%</b>	24.4%	20.5%	18.0%
<b>Online Retailer</b>	19.7%	18.2%	17.2%	18.9%	<b>28.6%</b>
<b>Jacket Material</b>	14.8%	12.9%	15.4%	<b>19.8%</b>	14.2%
<b>Sustainability</b>	5.1%	4.9%	3.0%	5.0%	9.0%
<b>Jacket Color</b>	13.2%	10.7%	<b>19.6%</b>	13.0%	10.5%
<b>Minimum Lifespan</b>	7.9%	6.5%	7.5%	<b>10.4%</b>	9.9%
<b>Delivery</b>	6.7%	5.4%	9.2%	6.4%	6.6%
<b>Return Policy</b>	4.1%	3.8%	3.7%	6.1%	3.2%

Table 36 Conjoint Analysis: Segmentation - Composition of "The Frugals"

Factor	Levels	The Frugals (n=142)		Overall	Delta (Relative Segment - Relative Overall)
		Absolute	Relative	Relative	Absolute
Gender	Female	95	66.9%	60.9%	6.0%
	Male	41	28.9%	35.4%	-6.5%
	Others	5	3.5%	2.5%	1.0%
	Prefer to not disclose	1	0.7%	1.2%	-0.5%
Educational Background	Less than High School	3	2.1%	2.2%	-0.1%
	High School Diploma	45	31.7%	31.7%	0.0%
	Bachelors	72	50.7%	48.4%	2.3%
	Masters	21	14.8%	16.8%	-2.0%
	MBA/PhD	1	0.7%	0.9%	-0.2%
Employment	Student	110	77.5%	69.9%	7.6%
	Part-time employed	7	4.9%	6.5%	-1.6%
	Full-time employed (incl. self-employed)	21	14.8%	21.4%	-6.6%
	None of the above	4	2.8%	2.2%	0.6%
Monthly Income	500€ or less	48	33.8%	27.6%	6.2%
	501-999€	40	28.2%	31.1%	-2.9%
	1000-1999€	37	26.1%	26.1%	0.0%
	2000-2999€	10	7.0%	8.4%	-1.4%

	3000-3999€	5	3.5%	5.0%	-1.5%
	4000+ €	2	1.4%	1.9%	-0.5%
<b>Shopping Frequency</b>	Every week	4	2.8%	2.5%	0.3%
	Every 2 weeks – 1 month	12	8.5%	10.2%	-1.7%
	Every 1-3 months	68	47.9%	44.7%	3.2%
	Every 4-6 months	30	21.1%	24.5%	-3.4%
	Once a year	28	19.7%	18.0%	1.7%

Table 37 Conjoint Analysis: Segmentation - Composition of the "Color Enthusiasts"

Factor	Levels	Color Enthusiasts (n=77)		Overall	Delta (Relative Segment - Relative Overall)
		Absolute	Relative	Relative	Absolute
<b>Gender</b>	Female	<b>42</b>	54.5%	60.9%	-6.4%
	Male	<b>32</b>	41.6%	35.4%	6.2%
	Others	<b>0</b>	0.0%	2.5%	-2.5%
	Prefer to not disclose	<b>3</b>	3.9%	1.2%	2.7%
<b>Educational Background</b>	Less than High School	<b>1</b>	1.3%	2.2%	-0.9%
	High School Diploma	<b>17</b>	22.1%	31.7%	-9.6%
	Bachelors	<b>43</b>	55.8%	48.4%	7.4%
	Masters	<b>15</b>	19.5%	16.8%	2.7%
	MBA/PhD	<b>1</b>	1.3%	0.9%	0.4%
<b>Employment</b>	Student	<b>48</b>	62.3%	69.9%	-7.6%
	Part-time employed	<b>6</b>	7.8%	6.5%	1.3%

	Full-time employed (incl. self-employed)	<b>23</b>	29.9%	21.4%	8.5%
	None of the above	<b>0</b>	0.0%	2.2%	-2.2%
<b>Monthly Income</b>	500€ or less	<b>19</b>	24.7%	27.6%	-2.9%
	501-999€	<b>22</b>	28.6%	31.1%	-2.5%
	1000-1999€	<b>20</b>	26.0%	26.1%	-0.1%
	2000-2999€	<b>7</b>	9.1%	8.4%	0.7%
	3000-3999€	<b>7</b>	9.1%	5.0%	4.1%
	4000+ €	<b>2</b>	2.6%	1.9%	0.7%
<b>Shopping Frequency</b>	Every week	<b>0</b>	0.0%	2.5%	-2.5%
	Every 2 weeks – 1 month	<b>13</b>	16.9%	10.2%	6.7%
	Every 1-3 months	<b>34</b>	44.2%	44.7%	-0.5%
	Every 4-6 months	<b>16</b>	20.8%	24.5%	-3.7%
	Once a year	<b>14</b>	18.2%	18.0%	0.2%

Table 38 Conjoint Analysis: Segmentation - Composition "Material Matters"

<b>Factor</b>	<b>Levels</b>	<b>Material Matters (n=54)</b>		<b>Overall</b>	<b>Delta (Relative Segment - Relative Overall)</b>
		Absolute	Relative	Relative	Absolute
<b>Gender</b>	Female	28	51.9%	60.9%	-9.0%
	Male	25	46.3%	35.4%	10.9%
	Others	1	1.9%	2.5%	-0.6%
	Prefer to not disclose	0	0.0%	1.2%	-1.2%
<b>Educational Background</b>	Less than High School	1	1.9%	2.2%	-0.3%
	High School Diploma	25	46.3%	31.7%	14.6%
	Bachelors	18	33.3%	48.4%	-15.1%
	Masters	10	18.5%	16.8%	1.7%

	MBA/PhD	0	0.0%	0.9%	-0.9%
<b>Employment</b>	Student	36	66.7%	69.9%	-3.2%
	Part-time employed	2	3.7%	6.5%	-2.8%
	Full-time employed (incl. self-employed)	13	24.1%	21.4%	2.7%
	None of the above	3	5.6%	2.2%	3.4%
<b>Monthly Income</b>	500€ or less	12	22.2%	27.6%	-5.4%
	501-999€	17	31.5%	31.1%	0.4%
	1000-1999€	15	27.8%	26.1%	1.7%
	2000-2999€	6	11.1%	8.4%	2.7%
	3000-3999€	3	5.6%	5.0%	0.6%
	4000+ €	1	1.9%	1.9%	0.0%
<b>Shopping Frequency</b>	Every week	2	3.7%	2.5%	1.2%
	Every 2 weeks – 1 month	3	5.6%	10.2%	-4.6%
	Every 1-3 months	20	37.0%	44.7%	-7.7%
	Every 4-6 months	19	35.2%	24.5%	10.7%
	Once a year	10	18.5%	18.0%	0.5%

Table 39 Conjoint Analysis: Segmentation - Composition "Brand Loyalists"

<b>Factor</b>	<b>Levels</b>	<b>Brand Loyalists (n=49)</b>		<b>Overall</b>	<b>Delta (Relative Segment - Relative Overall)</b>
		Absolute	Relative	Relative	Absolute
<b>Gender</b>	Female	<b>31</b>	63.3%	60.9%	2.4%
	Male	<b>16</b>	32.7%	35.4%	-2.7%
	Others	<b>2</b>	4.1%	2.5%	1.6%
	Prefer to not disclose	<b>0</b>	0.0%	1.2%	-1.2%
<b>Educational Background</b>	Less than High School	<b>2</b>	4.1%	2.2%	1.9%

	High School Diploma	15	30.6%	31.7%	-1.1%
	Bachelors	23	46.9%	48.4%	-1.5%
	Masters	8	16.3%	16.8%	-0.5%
	MBA/PhD	1	2.0%	0.9%	1.1%
<b>Employment</b>	Student	31	63.3%	69.9%	-6.6%
	Part-time employed	6	12.2%	6.5%	5.7%
	Full-time employed (incl. self-employed)	12	24.5%	21.4%	3.1%
	None of the above	0	0.0%	2.2%	-2.2%
<b>Monthly Income</b>	500€ or less	10	20.4%	27.6%	-7.2%
	501-999€	21	42.9%	31.1%	11.8%
	1000-1999€	12	24.5%	26.1%	-1.6%
	2000-2999€	4	8.2%	8.4%	-0.2%
	3000-3999€	1	2.0%	5.0%	-3.0%
	4000+ €	1	2.0%	1.9%	0.1%
<b>Shopping Frequency</b>	Every week	2	4.1%	2.5%	1.6%
	Every 2 weeks – 1 month	5	10.2%	10.2%	0.0%
	Every 1-3 months	22	44.9%	44.7%	0.2%
	Every 4-6 months	14	28.6%	24.5%	4.1%
	Once a year	6	12.2%	18.0%	-5.8%

Table 40 Conjoint Analysis: Segmentation – Preference Distribution of Online Retailers for "Brand Loyalists" vs. Sample Mean

Online Retailer	Brand Loyalists (n=49)	Sample (n=325)	Δ (Brand Loyalists – Sample)
ASOS	13.62%	28.85%	-15.23%
Zara	36.65%	24.43%	12.22%
H&M	16.94%	17.54%	-0.60%
Mango	31.93%	26.02%	5.91%

<b>Shein</b>	0.86%	3.16%	-2.3%
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Table 41 Scenario Analysis: Survey Design

Section	Description	Question	Answer
Section 1	Determine whether the participant corresponds to our study	1. Are you part of Gen z ? (1997-2012)	1. Yes
			2. No (If "no", survey will not appear)
		2. Have you ever shopped online ?	1. Yes
			2. No (If "no", question 2 will not appear)
Section 2	Analyze the different Scenarios	3.1. You need a new summer jacket. Scrolling through Instagram, you see a jacket from Zara that you like. You go to the website and search for this jacket. If you order the jacket online and choose to have it delivered at home, this option will cost you an additional 5€ (shipping costs). If you decide to ship it to the store and pick it up there, you will have no extra costs. What would you rather do?	1.I would rather spend the 5€ and have it delivered at home.
			2.I would rather save the 5€ and pick it up in-store.
		3.2. A brand offers you reward points through their app, that you can accumulate every time you make purchases. These points can be redeemed, and a discount can be obtained and used on any channel of the brand (in store/online). Would this offer increase your willingness to buy?	1. Yes, discounts sound like a great idea
			2.No, that doesn't make a difference
		3.3. An influencer that you like and have been following for a long time recommends a summer jacket. This jacket has a nice design and	1. Yes
			2. No

		<p>has good quality. However, the price is slightly higher than you would typically spend. Would the recommendation of your favorite influencer increase your willingness to buy?</p>		
		<p>3.4. You are about to purchase a summer jacket online that you have been looking for, for over a couple of weeks. Before you decide if you want to purchase the jacket, you search on social media for reviews. Overall you found good reviews and recommendations of the jacket online. Further, you discuss the possible purchase with your friends, and they say the price-quality ratio of this jacket is not worth it. What would influence your purchase decision?</p>	<p>1.I would still buy the jacket, because I found good reviews online.</p> <p>2.I would still buy the jacket, because neither my friends nor the online reviews influence my purchase decision</p> <p>3.I would not buy the jacket, because I value my friends' opinion</p>	
		<p>3.5. You are about to purchase a summer jacket online, without any extra costs, the delivery time is estimated at 2-3 days. The option "clicks and go" shows you the real-time stock of the nearest store, so you can pay online and pick it up immediately. Which option do you choose?</p>	<p>1. I don't want to wait, so I prefer to buy online and pick it up in-store</p> <p>2.I don't mind waiting, I prefer having it delivered to my house</p>	
		<p>3.6. H&amp;Ms Marketing campaign "Close the Loop" promotes sustainable fashion through its clothing recycling program. The campaign encourages consumers to recycle using the hashtag "Closing the Loop" on Instagram. Through these actions, H&amp;M rewards customers who participate in the initiative. Would campaigns like these influence the way you perceive this brand?</p>	<p>1. Yes, I'm more likely to shop at brands that support sustainable causes</p> <p>2.No, this campaigns don't really make a difference in the way I perceive the brand</p>	
	Section 3	Analyze the demographic	5. What is your gender?	<p>1.Male</p> <p>2. Female</p>

features of the collected sample		3. Others
		4. Prefer to not disclose
	6. What is your age?	1.1997-2000
		2.2001-2004
		3.2005-2008
		4.2009-2012
	7. What is the highest education you have completed?	1. Less than High School
		2. High School Diploma
		3. Bachelor's degree
		4. Master's degree
		5. MBA/PhD
	8. What is your current professional status?	1. Student
		2. Part-Time Employed
		3. Full-Time employed
		4. None of the above (e.g., job seeking)
	9. What is your monthly household liquid income ?	1. 500€ or less
		2. Between 501 and 999€
		3. Between 1000 and 1999€
		4. Between 2000 and 2999€
		5. Between 3000 and 3999€
		6. More than 4000€
10. Where are you from?	1. Insert Country	

Table 42 Scenario Analysis: Answer Selection

	Q1	Q2	Q3	Q4	Q5	Q6
<b>Total</b> (n=219)	<b>0.3790</b>	<b>0.1324</b>	<b>0.2100</b>	<b>0.8174</b>	<b>0.3014</b>	<b>0.2557</b>

Table 43 Scenario Analysis: Answer Selection Male vs. Female

		ANOVA				
		Sum of Squares	df	Mean Square	F	Sig.
Q1	Between Groups	.161	1	.161	.680	.411
	Within Groups	51.382	217	.237		
	Total	51.543	218			
Q2	Between Groups	.002	1	.002	.021	.886
	Within Groups	25.157	217	.116		
	Total	25.160	218			
Q3	Between Groups	.007	1	.007	.044	.834
	Within Groups	36.331	217	.167		
	Total	36.338	218			
Q4	Between Groups	.060	1	.060	.092	.762
	Within Groups	142.634	217	.657		
	Total	142.694	218			
Q5	Between Groups	.160	1	.160	.758	.385
	Within Groups	45.949	217	.212		
	Total	46.110	218			
Q6	Between Groups	2.084	1	2.084	11.419	<.001
	Within Groups	39.597	217	.182		
	Total	41.680	218			

Table 44 Scenario Analysis: Selection Ratio based on Gender

Gender/Question	Q1	Q2	Q3	Q4	Q5	Q6
<b>Female</b> (n=116)	0.3534	0.1293	0.2155	0.8017	0.2759	0.1638
<b>Male</b> (n=103)	0.4078	0.1359	0.2039	0.8350%	0.3301	0.3592
<b>Total</b> (n=219)	<b>0.3790</b>	<b>0.1324</b>	<b>0.2100</b>	<b>0.8174</b>	<b>0.3014</b>	<b>0.2557</b>

Table 45 Scenario Analysis: ANOVA Selection based on Professional Status

		ANOVA				
		Sum of Squares	df	Mean Square	F	Sig.
Q1	Between Groups	3.361	3	1.120	5.000	.002
	Within Groups	48.182	215	.224		
	Total	51.543	218			
Q2	Between Groups	.224	3	.075	.644	.587
	Within Groups	24.936	215	.116		
	Total	25.160	218			
Q3	Between Groups	.825	3	.275	1.665	.176
	Within Groups	35.513	215	.165		
	Total	36.338	218			
Q4	Between Groups	3.022	3	1.007	1.550	.202
	Within Groups	139.672	215	.650		
	Total	142.694	218			
Q5	Between Groups	.947	3	.316	1.502	.215
	Within Groups	45.163	215	.210		
	Total	46.110	218			
Q6	Between Groups	.332	3	.111	.576	.631
	Within Groups	41.348	215	.192		
	Total	41.680	218			

Table 46 Scenario Analysis: ANOVA Selection based on Professional Status

		Descriptives							
		N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
						Lower Bound	Upper Bound		
Q1	Student	147	.3061	.46246	.03814	.2307	.3815	.00	1.00
	Part-Time Employed	23	.3913	.49901	.10405	.1755	.6071	.00	1.00
	Full-Time employed	48	.6042	.49420	.07133	.4607	.7477	.00	1.00
	None of the above	1	.0000	.	.	.	.	.00	.00
	Total	219	.3790	.48625	.03286	.3142	.4438	.00	1.00
Q2	Student	147	.1429	.35112	.02896	.0856	.2001	.00	1.00
	Part-Time Employed	23	.0435	.20851	.04348	-.0467	.1336	.00	1.00
	Full-Time employed	48	.1458	.35667	.05148	.0423	.2494	.00	1.00
	None of the above	1	.0000	.	.	.	.	.00	.00
	Total	219	.1324	.33972	.02296	.0872	.1777	.00	1.00
Q3	Student	147	.2245	.41867	.03453	.1562	.2927	.00	1.00
	Part-Time Employed	23	.1304	.34435	.07180	-.0185	.2793	.00	1.00
	Full-Time employed	48	.1875	.39444	.05693	.0730	.3020	.00	1.00
	None of the above	1	1.0000	.	.	.	.	1.00	1.00
	Total	219	.2100	.40827	.02759	.1557	.2644	.00	1.00
Q4	Student	147	.8912	.82867	.06835	.7561	1.0262	.00	2.00
	Part-Time Employed	23	.7391	.81002	.16890	.3889	1.0894	.00	2.00
	Full-Time employed	48	.6458	.72902	.10523	.4341	.8575	.00	2.00
	None of the above	1	.0000	.	.	.	.	.00	.00
	Total	219	.8174	.80905	.05467	.7096	.9251	.00	2.00
Q5	Student	147	.2857	.45330	.03739	.2118	.3596	.00	1.00
	Part-Time Employed	23	.2174	.42174	.08794	.0350	.3998	.00	1.00
	Full-Time employed	48	.3750	.48925	.07062	.2329	.5171	.00	1.00
	None of the above	1	1.0000	.	.	.	.	1.00	1.00
	Total	219	.3014	.45990	.03108	.2401	.3626	.00	1.00
Q6	Student	147	.2789	.45000	.03712	.2056	.3523	.00	1.00
	Part-Time Employed	23	.1739	.38755	.08081	.0063	.3415	.00	1.00
	Full-Time employed	48	.2292	.42474	.06131	.1058	.3525	.00	1.00
	None of the above	1	.0000	.	.	.	.	.00	.00
	Total	219	.2557	.43726	.02955	.1975	.3139	.00	1.00

*Table 47 Comparison of Relative Attribute Importance by ChatGPT and findings of the researchers after adjustments*

Factor	Chat GPT	Researcher Results	Delta to Range
Price	23-25%	28.5%	+3.5%
Online Retailer	15-20%	19.7%	Within Range
Jacket Material	15-20%	14.8%	-0.2%
Color	12-15%	13.2%	Within Range
Minimum Lifespan	10-15%	7.9%	-2.1%
Sustainability	8-12%	5.1%	-2.9%
Delivery	3-5%	6.7%	+1.7%
Return Policy	1-3%	4.1%	+1.1%

Figure 2 Perceptual Map: Ratio of respondents that are part of Gen Z (n=231)



Figure 3 Perceptual Map: Ratio of respondents that know at least one of the brands (n=231)

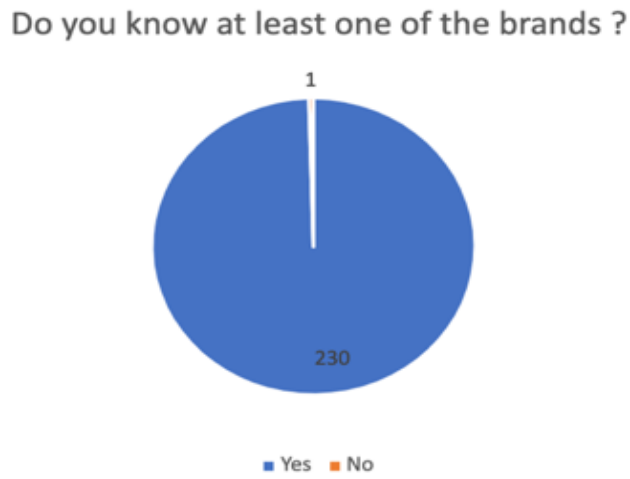


Figure 4 Perceptual Map: Ratio of respondents that have bought from at least one of the brands (n=230)

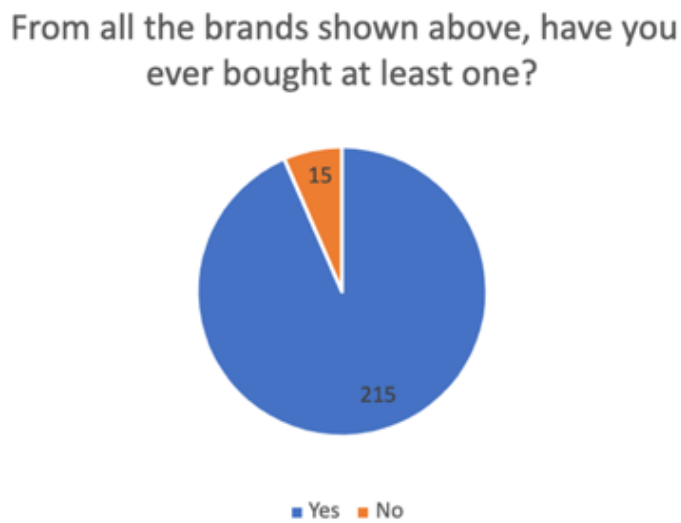


Figure 5 Perceptual Map: Histogram of Age (n=215)

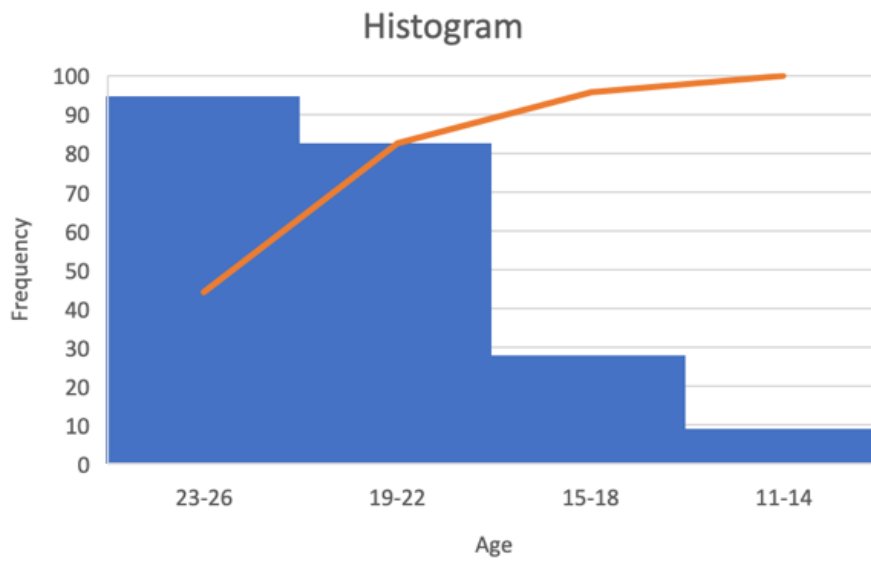


Figure 6 Perceptual Map: Sample Monthly Liquid Income (n=215)

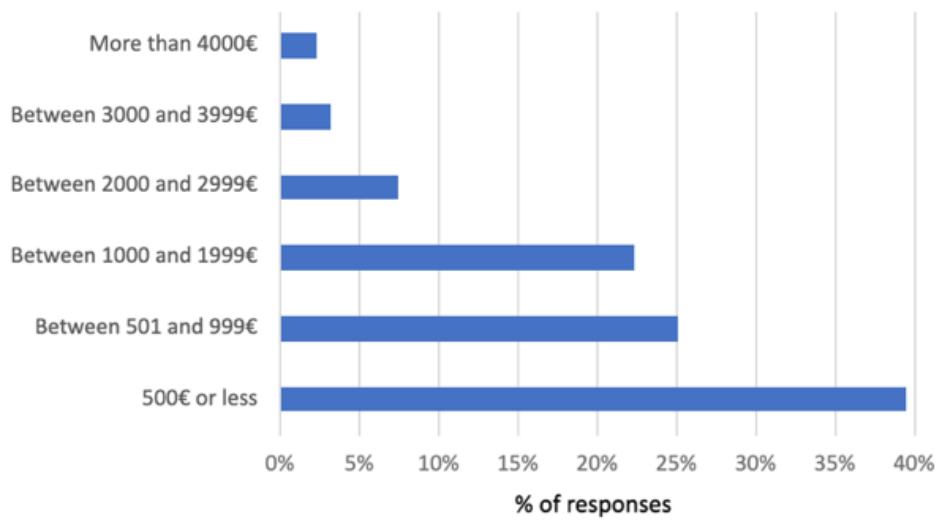


Figure 7 Perceptual Map: Sample Online Shopping Frequency (n=215)

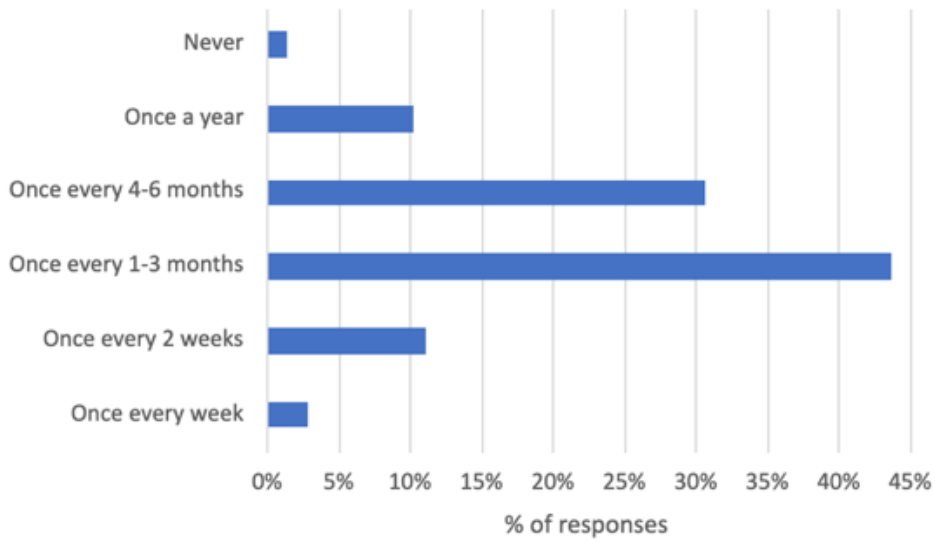


Figure 8 Perceptual Map: Histogram of Channels

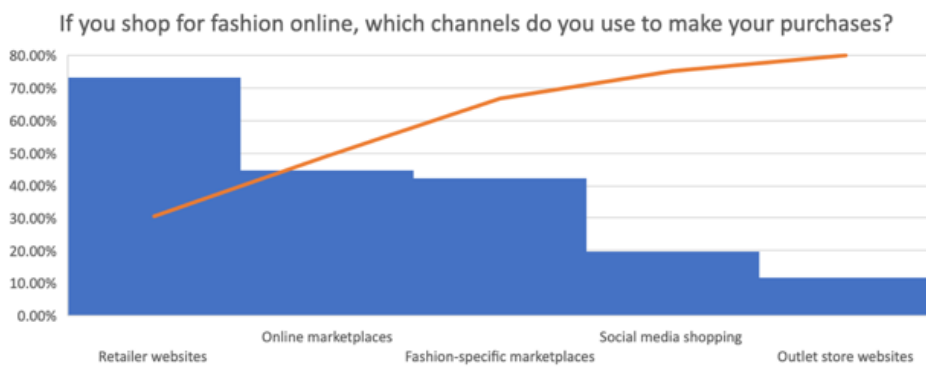


Figure 9 Perceptual Map: Sample Influences

9. Who do you feel influences you the most before buying clothes ?

[More Details](#)

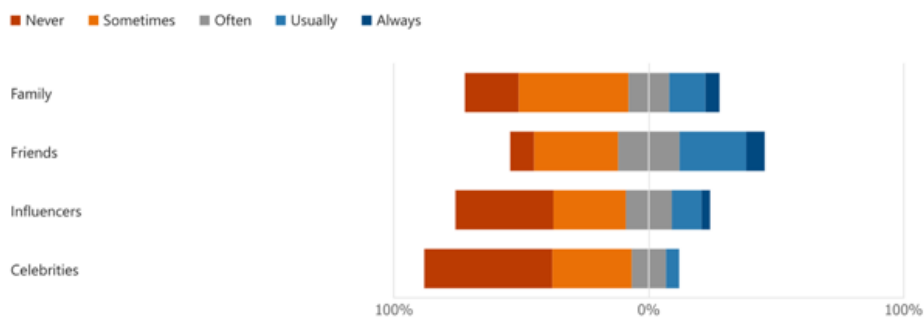


Figure 10 Perceptual Map: Sample Inspiration

10. Where do you get fashion inspiration to shop online ?

[More Details](#)

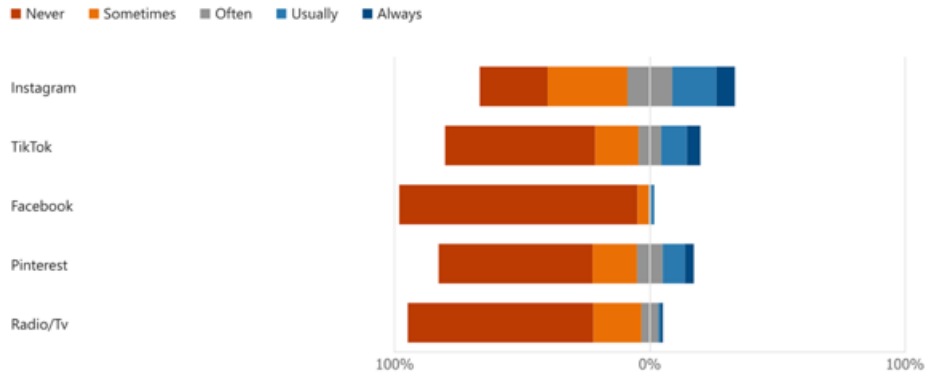


Figure 11 Perceptual Map: Sample Preference of Place(n=215)

Where do you buy clothes ?

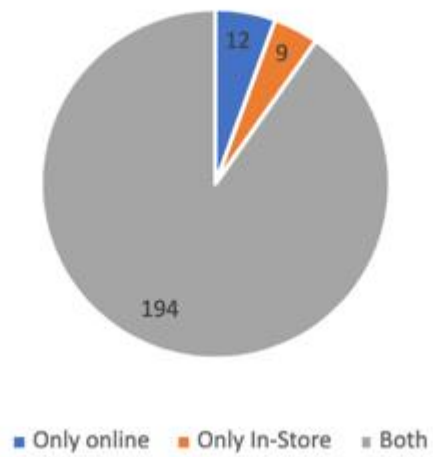


Figure 12 Perceptual Map: Histogram of Reasons to Shop In-Store



Figure 13 Perceptual Map: Histogram of Brand Awareness

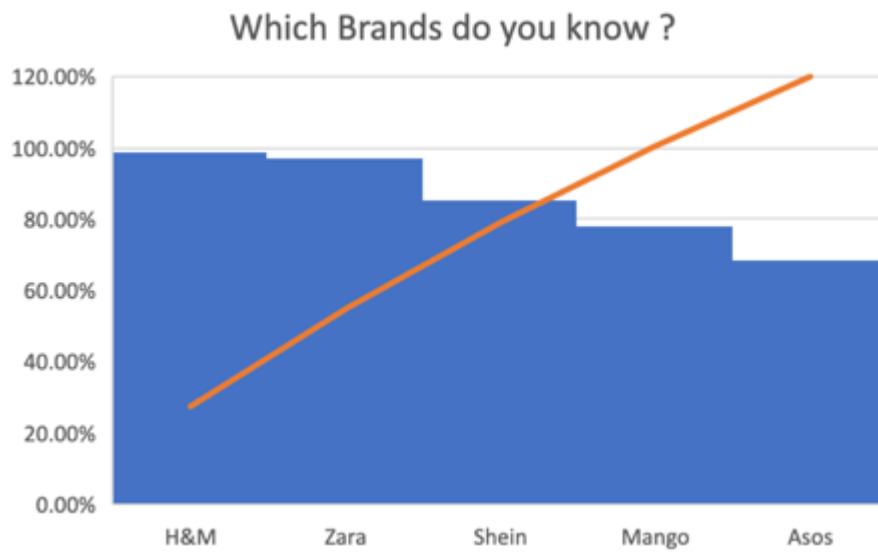


Figure 14 Perceptual Map: Histogram of Ratio of respondents that have bought from the brand (n=215)



Figure 15 Perceptual Map: Scree Plot

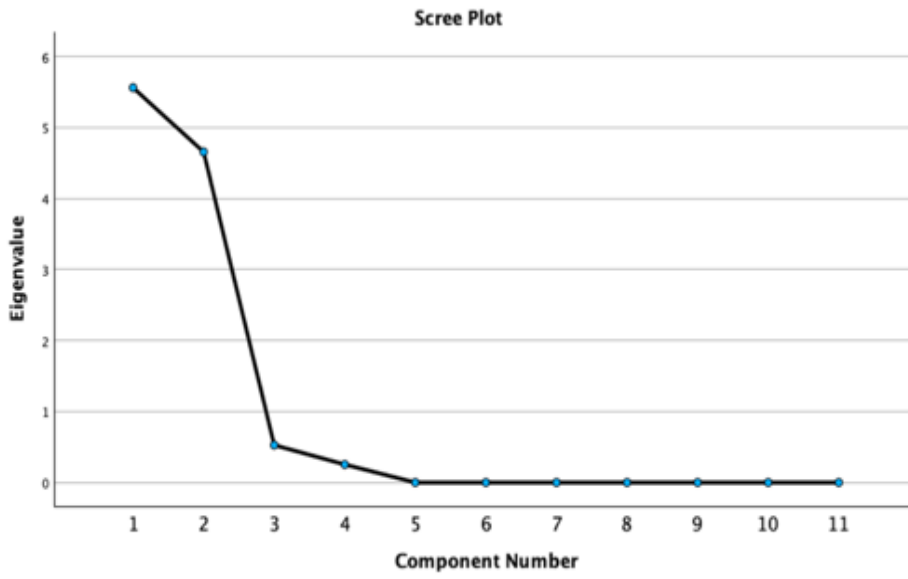


Figure 16 Perceptual Map: Attributes Distribution

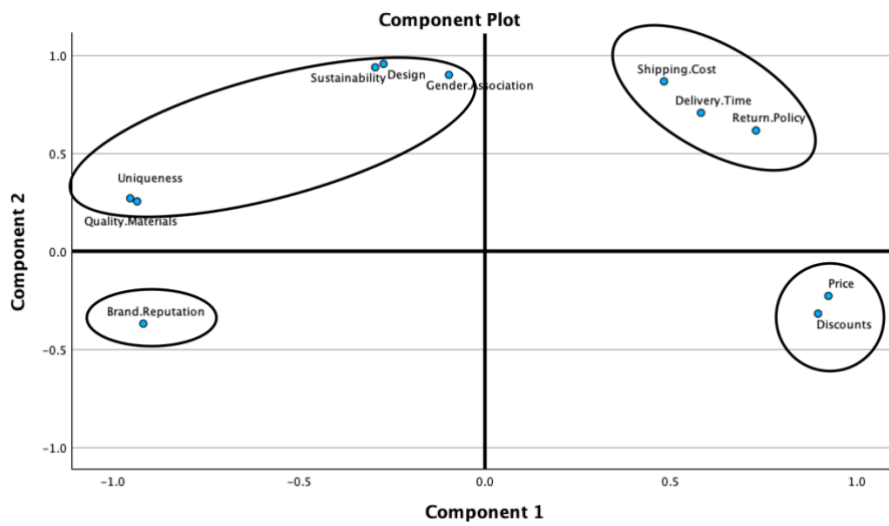


Figure 17 Perceptual Map: Brands Distribution

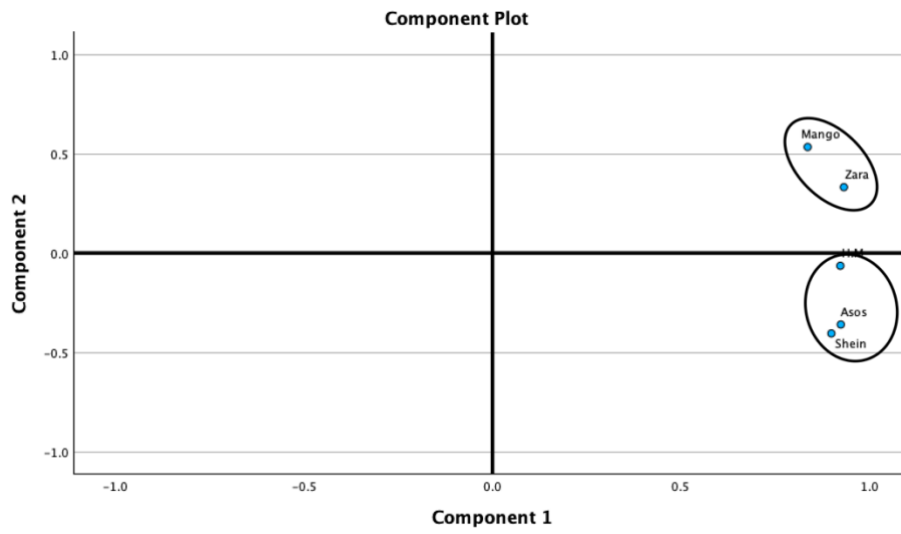


Figure 18 Perceptual Map: Combination of Attributes and Brands Distribution

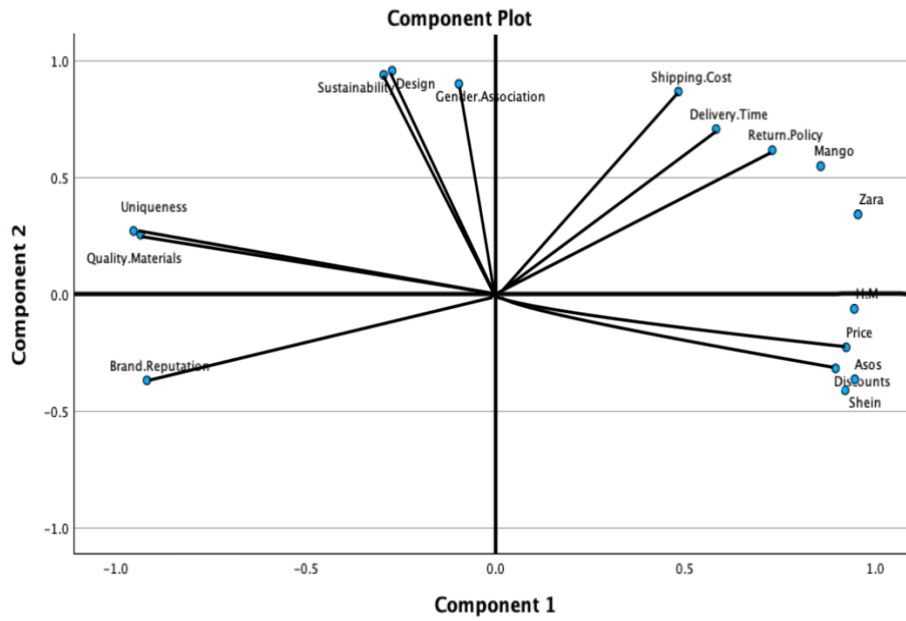


Figure 19 Conjoint Analysis: Histogram of Birth Distribution (n=322)

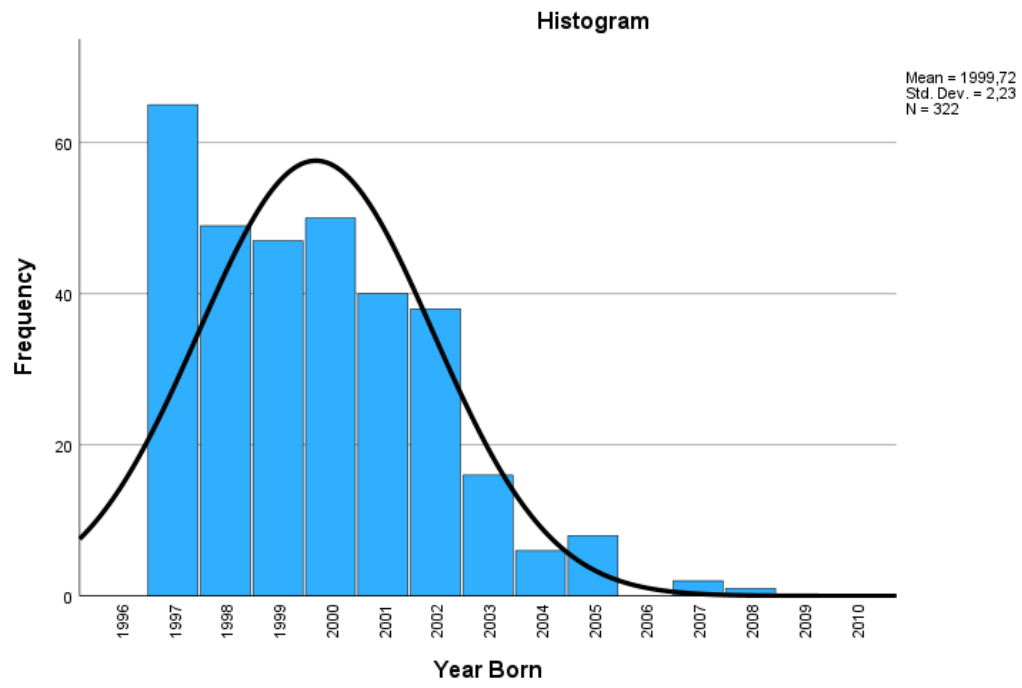


Figure 20 Conjoint Analysis: Sample Monthly Liquid Income

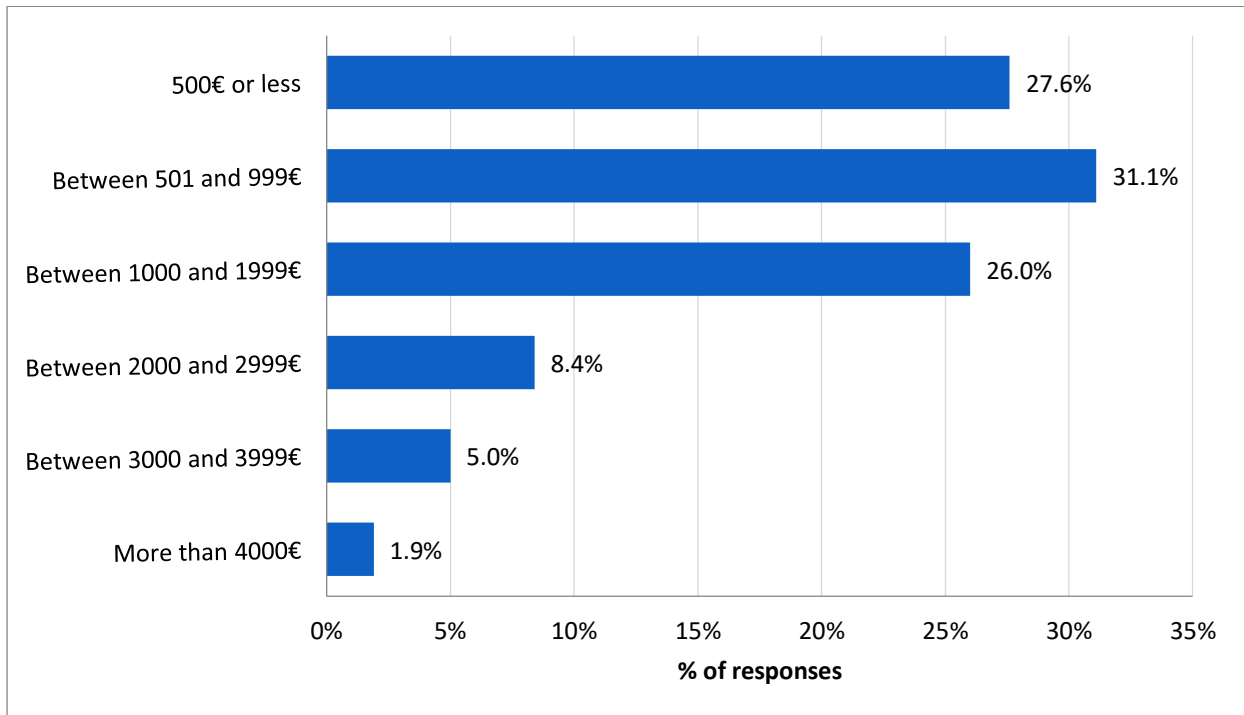


Figure 21 Conjoint Analysis: Relative Importance of Attributes

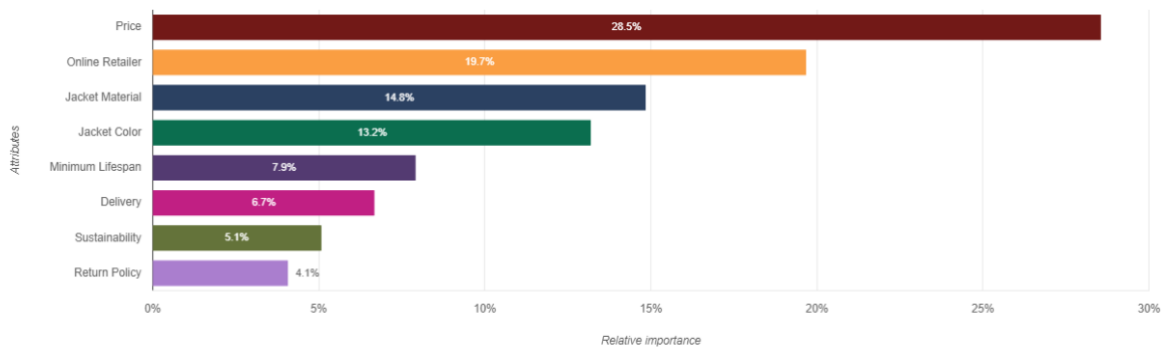


Figure 22 Conjoint Analysis: Analysis of Level Preference - Average Online Retailer Preference

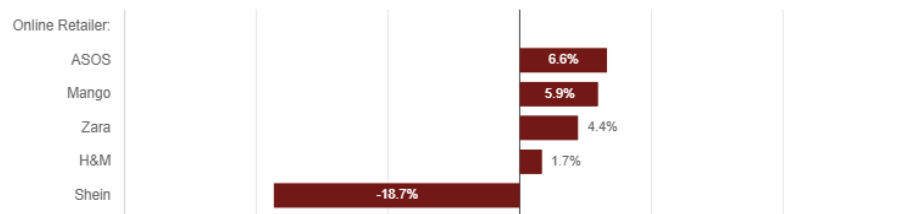


Figure 23 Conjoint Analysis: Analysis of Level Preference - Individual Online Retailer Preference

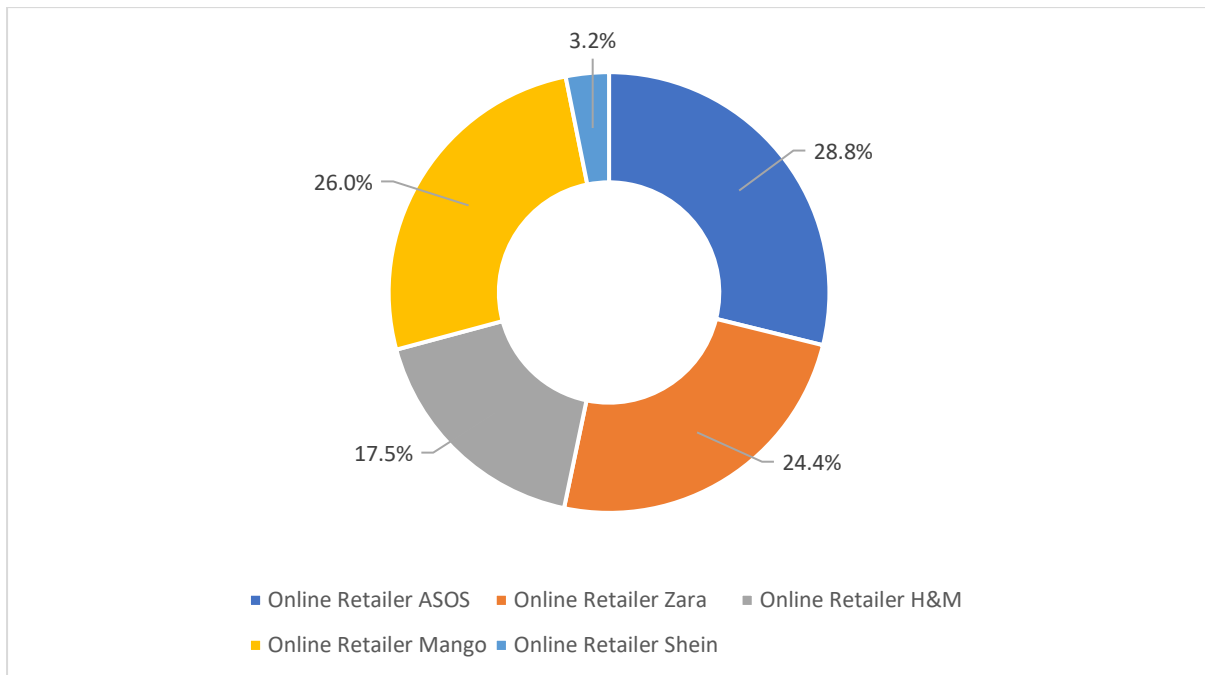


Figure 24 Conjoint Analysis: Analysis of Level Preference - Average Jacket Material Preference

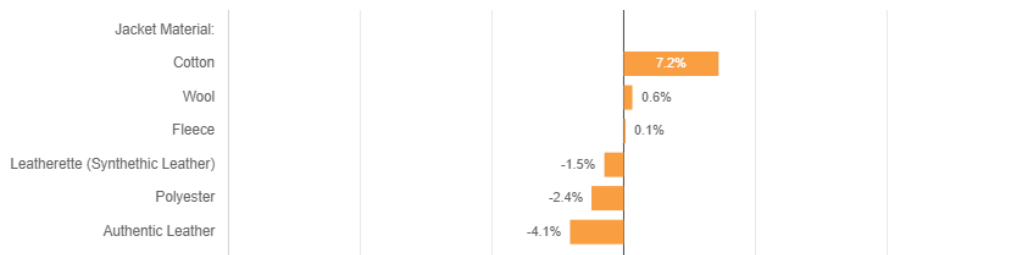


Figure 25 Conjoint Analysis: Analysis of Level Preference - Individual Jacket Material Preference

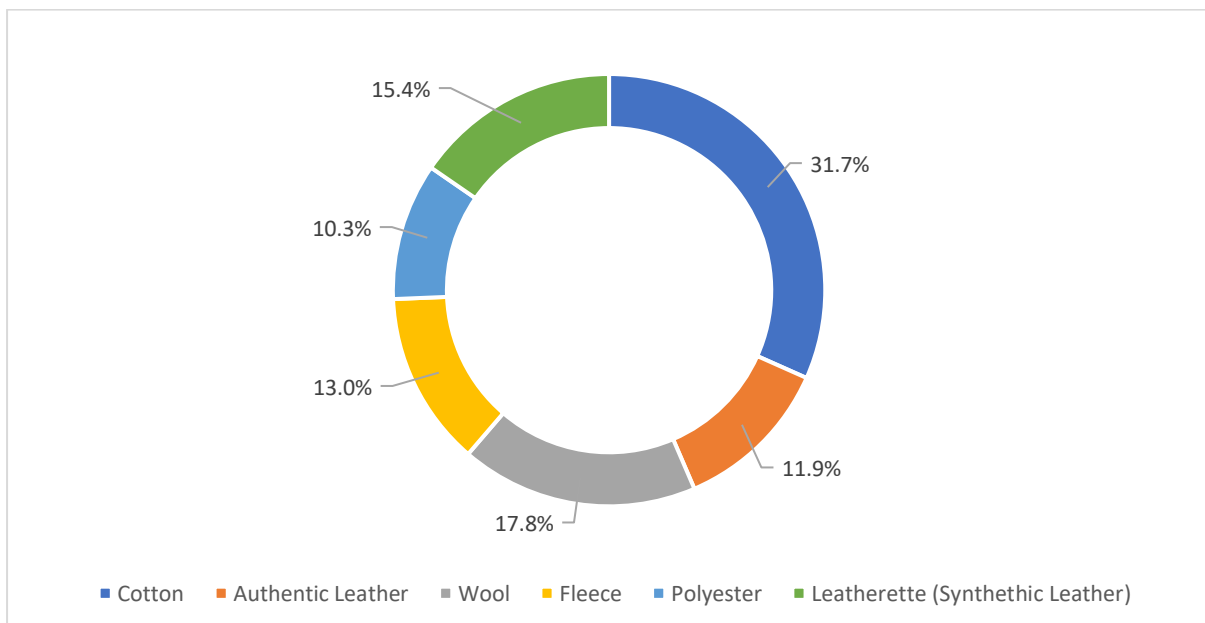


Figure 26 Conjoint Analysis: Analysis of Level Preference - Average Sustainability Preference



Figure 27 Conjoint Analysis: Analysis of Level Preference - Individual Sustainability Preference

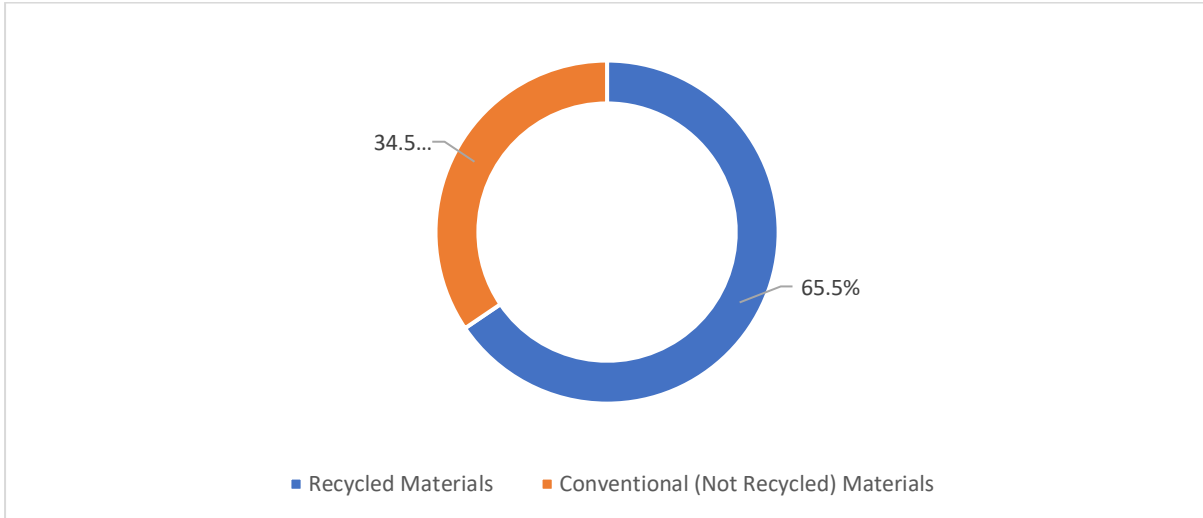


Figure 28 Conjoint Analysis: Analysis of Level Preference - Average Jacket Color Preference

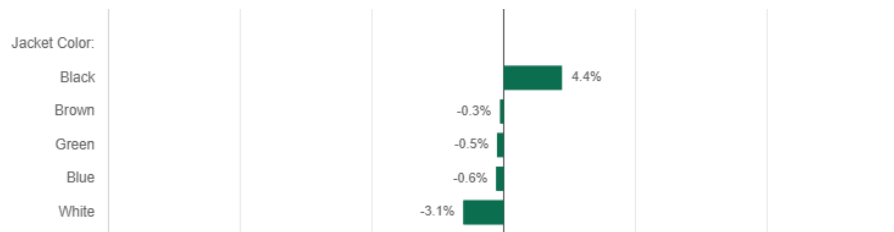


Figure 29 Conjoint Analysis: Analysis of Level Preference - Individual Jacket Color Preference

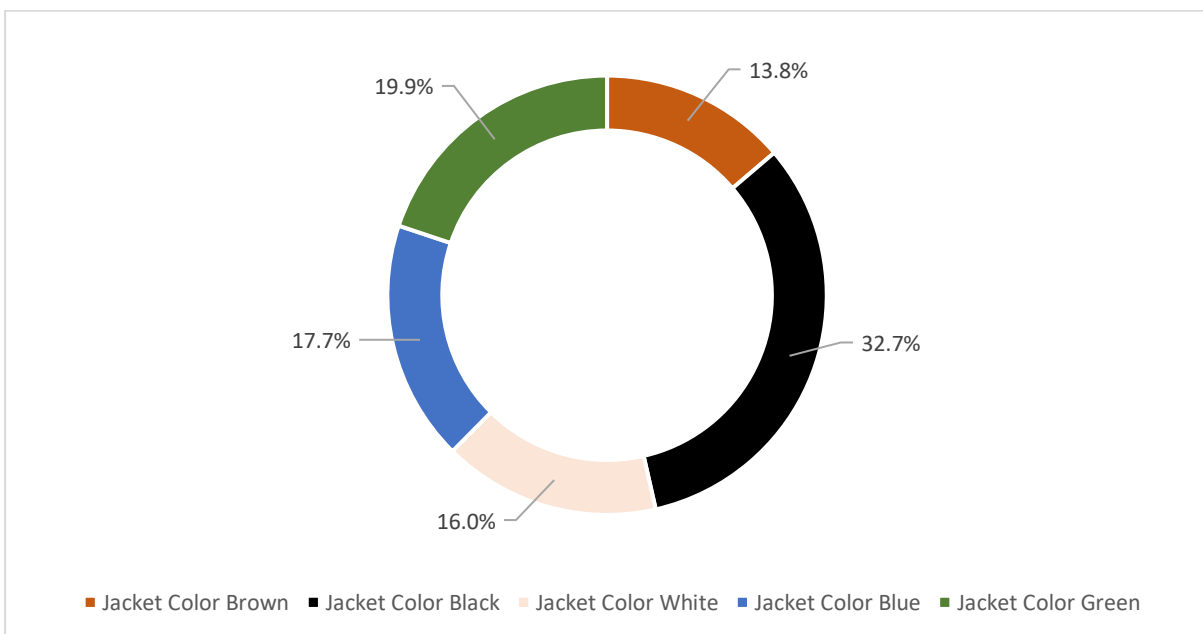


Figure 30 Conjoint Analysis: Analysis of Level Preference - Average Durability Preference

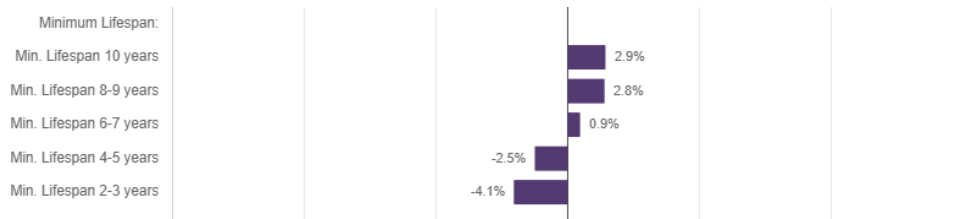


Figure 31 Conjoint Analysis: Analysis of Level Preference - Individual Durability Preference

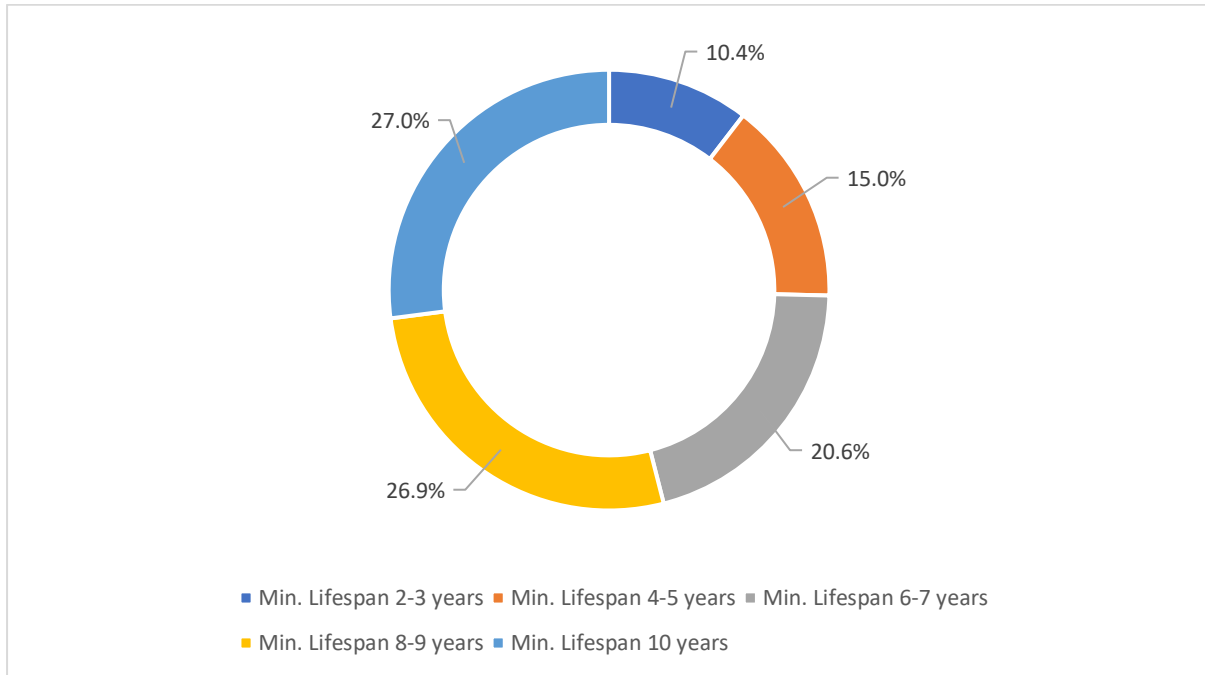


Figure 32 Conjoint Analysis: Analysis of Level Preference - Average Delivery Preference

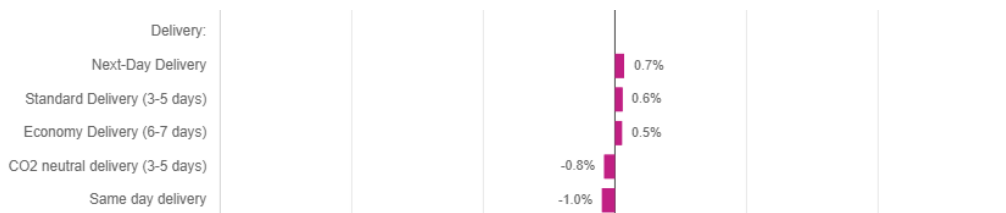


Figure 33 Conjoint Analysis: Analysis of Level Preference - Average Return Policy Preference



Figure 34 Conjoint Analysis: Analysis of Level Preference - Individual Delivery Preference

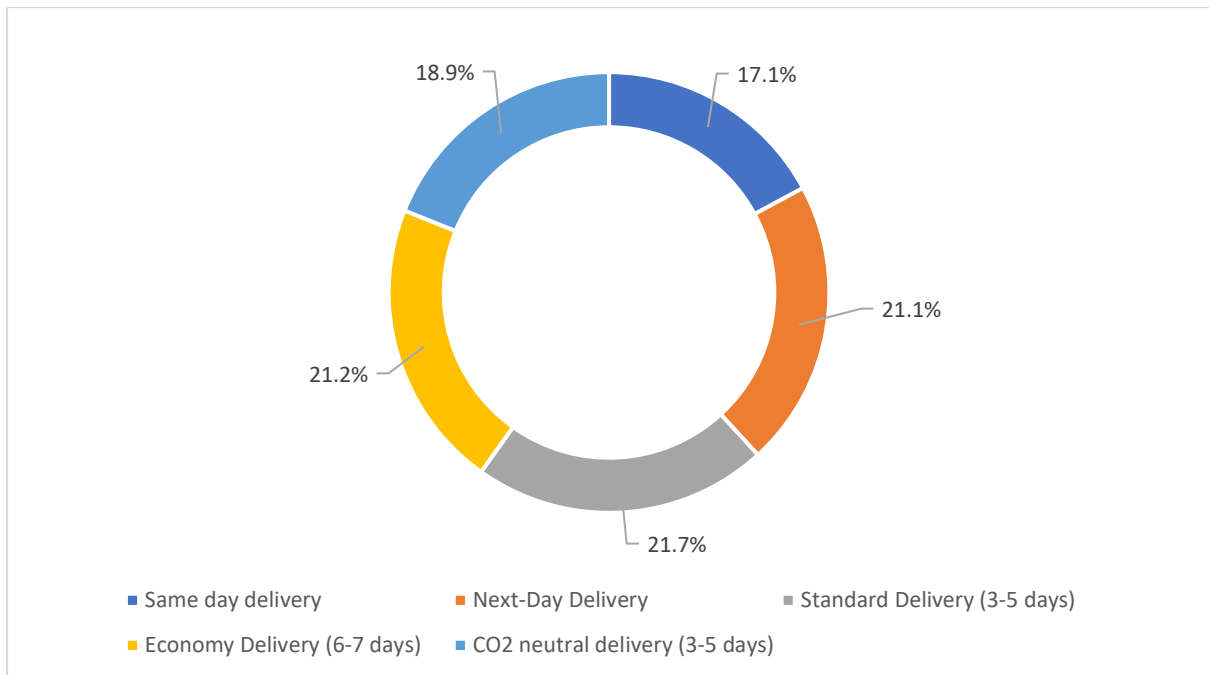


Figure 35 Conjoint Analysis: Analysis of Level Preference - Individual Return Policy Preference

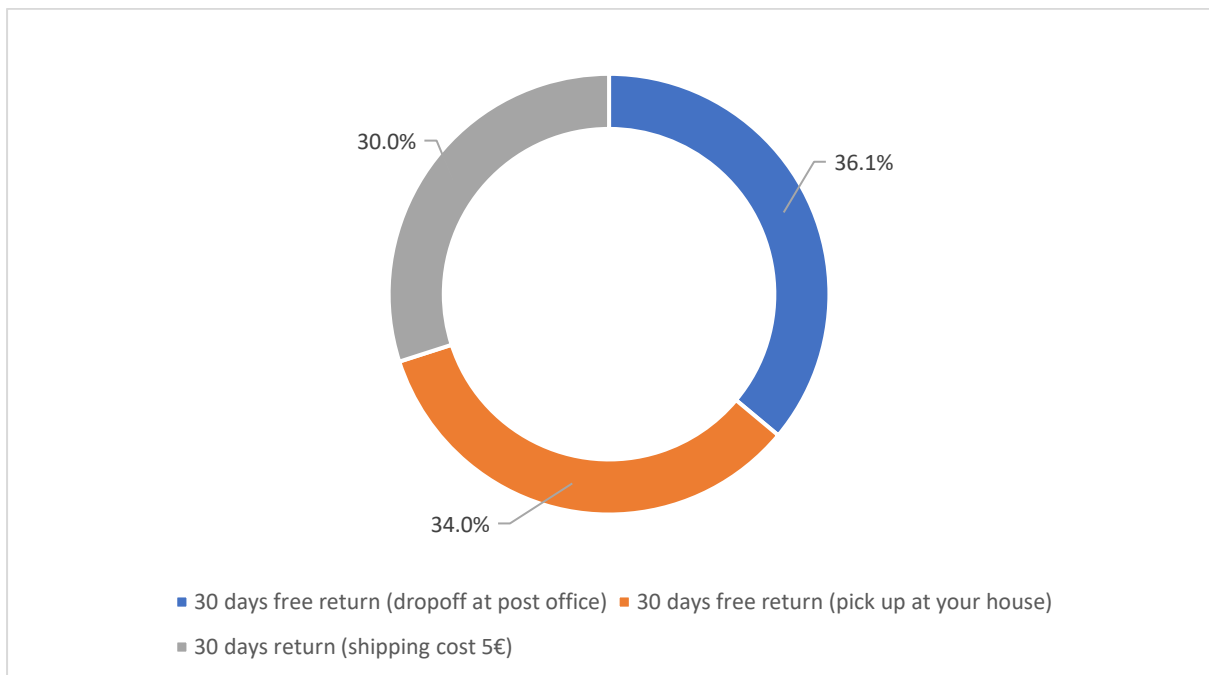


Figure 36 Conjoint Analysis: Price preference analysis - Percentage of times chosen when displayed

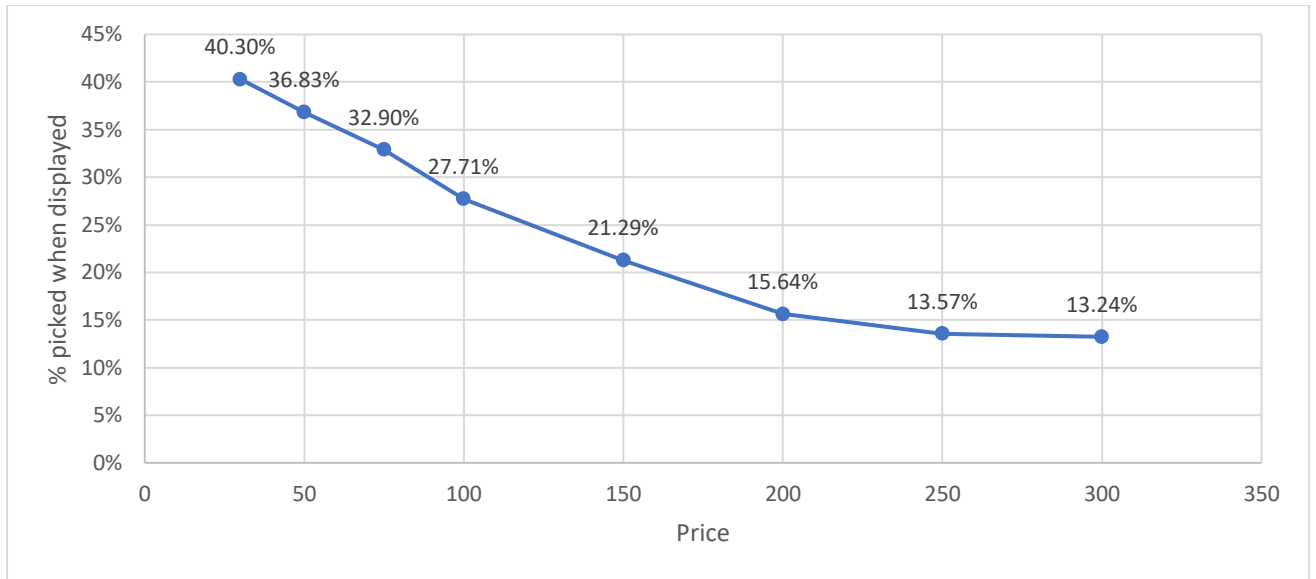


Figure 37 Conjoint Analysis: Analysis of Level Preference - Average Price Preference

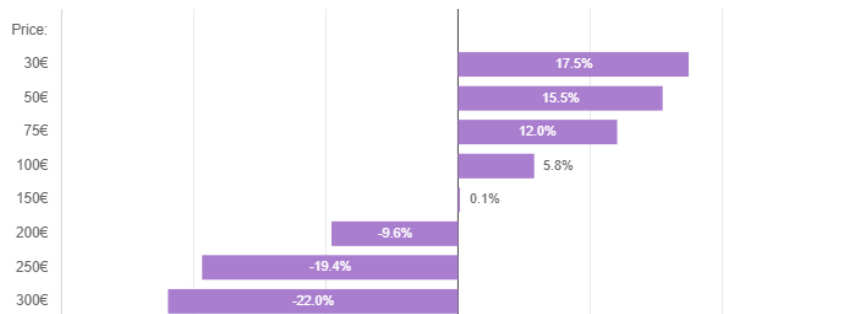


Figure 38 Conjoint Analysis: Analysis of Level Preference - Individual Price Preference

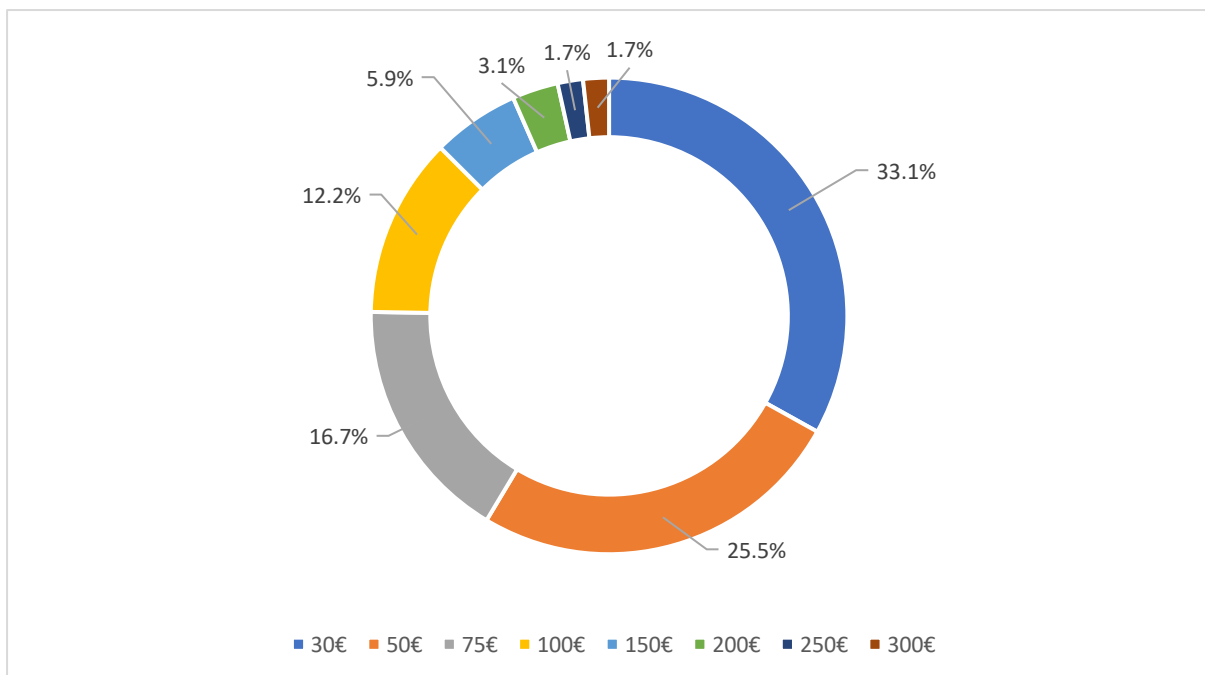


Figure 39 Conjoint Analysis: Impact of Pricing on Preference Female vs. Male



Figure 40 Scenario Analysis: Ratio of Respondents that are Part of Gen Z (n=221)

Are you part of Gen z ?

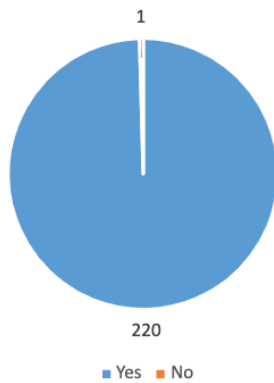


Figure 41 Scenario Analysis: Ratio of Respondents that Shop Online (n=220)

Have you ever shopped online ?

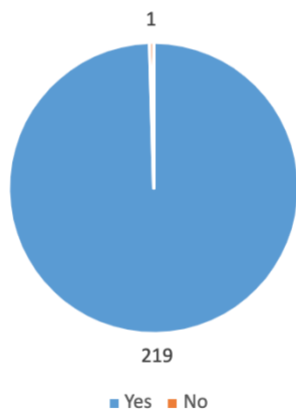


Figure 42 Scenario Analysis: Gender Distribution (n=219)

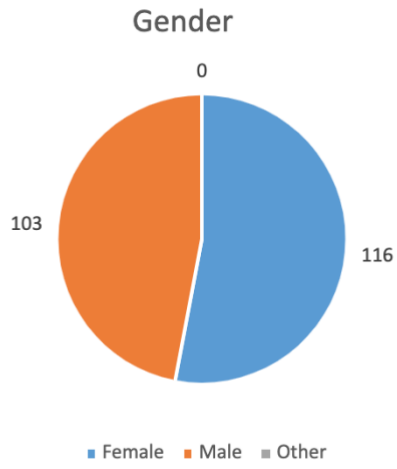


Figure 43 Scenario Analysis: Histogram of Age (n=219)

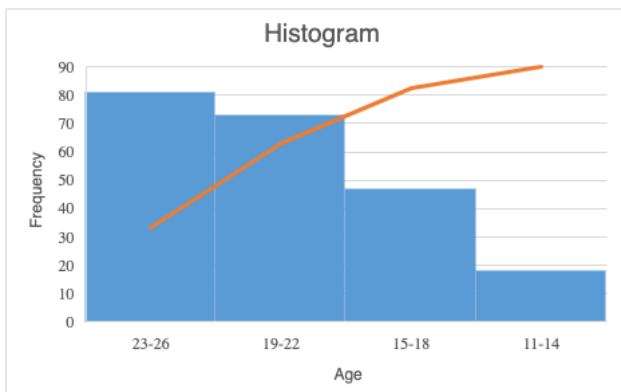


Figure 44 Scenario Analysis: Distribution of Educational Level (n=219)

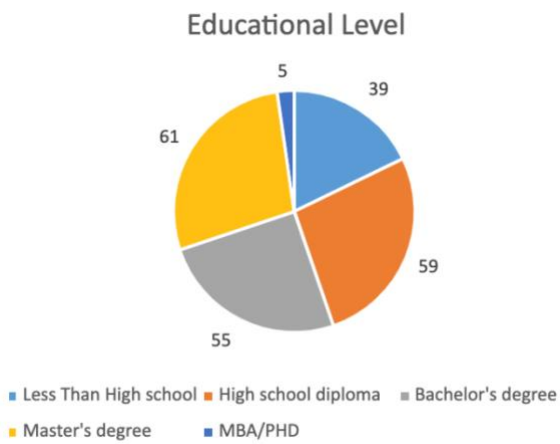


Figure 45 Scenario Analysis: Histogram of Professional Status (n=219)

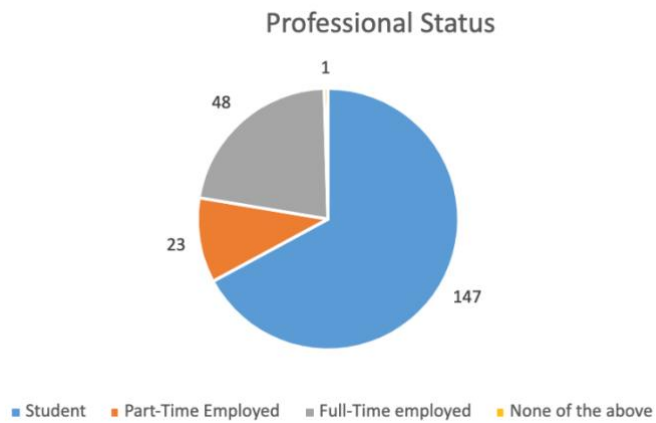


Figure 46 Scenario Analysis: Histogram of Monthly Liquid Income (n=219)

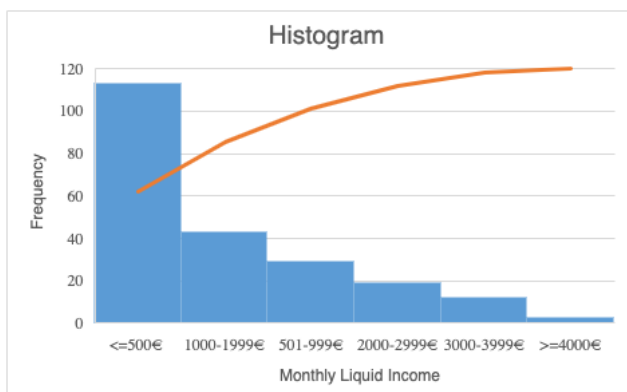


Figure 47 Scenario Analysis: Distribution of Nationality (n=219)

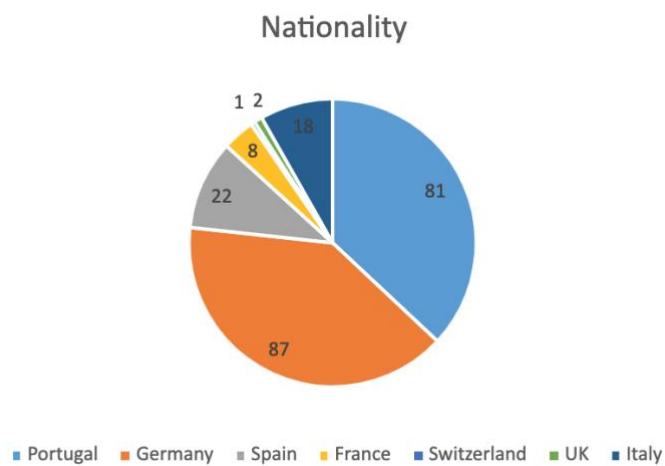




Figure 48 Conjoint Analysis via ChatGPT: Relative Importance of Gen Z according to ChatGPT





 C Ok let's do an experiment. Please do a simulation for a conjoint analysis that addresses Generation Z, specifically those born between 1997 and 2012. 

The analysis focuses on summer jackets. There Attributes with its respective levels are:

- Online Retailer: Asos, Zara, Shein, Mango and H&M
- Jacket Material: Authentic Leather, Leatherette, Wool, Fleece, Polyester and Cotton
- Sustainability: Recycled materials and conventional (non recycled materials)
- Jacket Colors: Brown, Black, White, Blue and Green
- Minimum Lifespan of the jacket: 2-3 years, 4-5 years, 6-7 years, 8-9 years, 10 years
- Delivery: Same-day delivery, next-day delivery, standard delivery (3-5 days), economy delivery (6-7 days) and CO2 neutral delivery (3-5 days)
- Return Policy: 30 days free return with dropoff at post office, 30 days free return with pick up at your house, 30 days free return with 5€ shipping costs
- Price: 30€, 50€, 75€, 100€, 150€, 200€, 250€, 300€

Please estimate the relative attribute importance by attribute for the average consumer

---

 Sure! Based on the simulation results and assuming a linear model, here are the relative attribute importance estimates for the average consumer:   

- Online Retailer: 22.6%
- Jacket Material: 21.3%
- Sustainability: 16.2%
- Jacket Color: 13.6%
- Minimum Lifespan: 11.8%
- Delivery: 7.6%
- Return Policy: 5.8%
- Price: 1.1%

This suggests that for the average consumer, the retailer and the material of the jacket are the most important attributes, followed by sustainability, color, minimum lifespan, delivery, return policy, and finally price.

Figure 49 Conjoint Analysis via ChatGPT: Relative Attribute Importance for Gen Z after providing extra information

I apologize for the confusion earlier. Relative attribute importance is typically represented as a percentage rather than a mean. Nonetheless, here are the estimated relative attribute importances expressed as percentages based on the conjoint analysis for the given attributes and levels for Generation Z:

### Attribute Relative Importance

- Price 23-25%
- Online Retailer 15-20%
- Jacket Material 15-20%
- Color 12-15%
- Minimum Lifespan 10-15%
- Sustainability 8-12%
- Delivery 3-5%
- Return Policy 1-3%

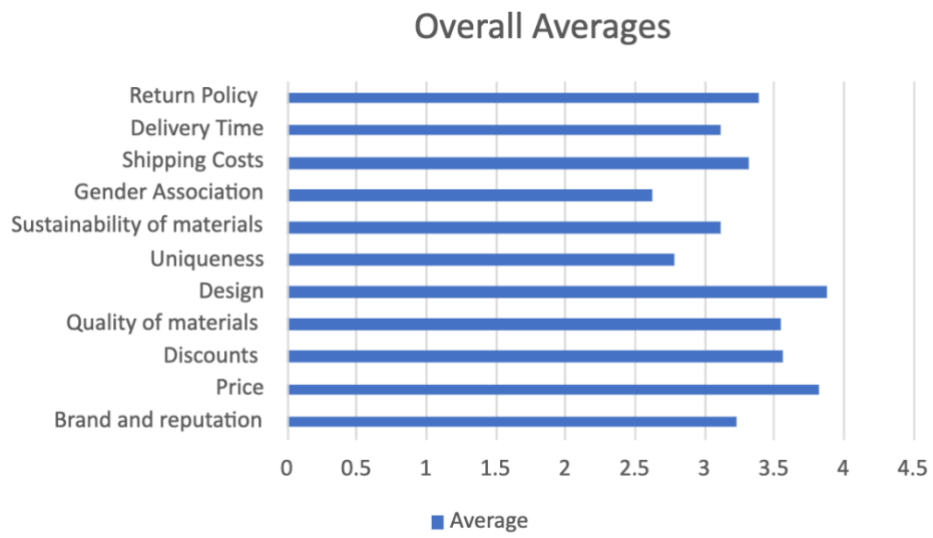
Please note that these percentages are rough estimates based on the given information and assumptions. The actual relative importance may vary depending on the sample and specific context of the conjoint analysis.

Figure 50 Conjoint Analysis via ChatGPT: Chat Log ChatGPT Evaluation of highest preferred level

Sure, based on the simulation results, the highest preferred level for each attribute among Generation Z for summer jackets are:

- Online Retailer: Asos
- Jacket Material: Cotton
- Sustainability: Recycled materials
- Jacket Colors: Black
- Minimum Lifespan of the jacket: 8-9 years
- Delivery: CO2 neutral delivery (3-5 days)
- Return Policy: 30 days free return with pick up at your house
- Price: 30€

Figure 51 Perceptual Map: Overall Average of Attributes



## **Interview#1**

**Interviewee: Klaudia Leo**

**Interviewer: Christian Keber**

**Date & Time: 19<sup>th</sup> March 2023, 14:40-15:10 (CET)**

**Location: In-Person**

**Category: Online Shopper (Bought Jacket Online)**

Christian: Hello, Klaudia. Thank you for agreeing to be interviewed as part of our master thesis. We are looking into consumer preferences and willingness-to-pay of Generation-Z when it comes to buying jackets, specifically online. Firstly, I would like to ask you whether you are actively buying fashion products online or whether you buy them directly at the store?

Klaudia: I shop online.

Christian: How frequently do you shop online for fashion products?

Klaudia: It differs a bit, but usually once every 1-2 months.

Christian: Considering our topic focuses on jackets specifically, I wanted to ask if you have bought a jacket online yet? If not, could you please provide a short overview of what kind of products you typically buy?

Klaudia: Yes I have bought jackets online already.

Christian: From which online retailers – you can mention multiple ones here – do you actively buy/look for jackets?

Klaudia: Mostly Shein, but from time to time also H&M, Deichmann, Zalando, Pimkie and Amazon.

Christian: What would you say are the main reasons for you to buy jackets online?

Klaudia: There are more choices available, so models and sizes and sometimes it's cheaper because there are discounts compared to buying in store. There is also a possibility of free shipping and free or convenient return. It's not overwhelming because in shops there are usually many choices but too little overview of all products that would be comparable to be considered buying. In online shops you can simply filter for specific attributes providing you a better overview. It is also less time consuming, there's no time to travel/waiting in line in the cashier or waiting in line in the fitting room involved. I think also that shops are very warm and uncomfortable especially in winter. Not taking off the jacket is too warm, taking off the jacket means you need to take it around everywhere. Online shopping is convenient because you can choose where you

do it from. Also, if you buy tons of items, it can get heavy. Bringing it to the car, which is often far from the shop or taking it home with public transport is inconvenient. But with online shopping, you get the items delivered to your home immediately. You don't even have to pay for the packaging or bags.

Christian: Could you please also rank these factors you just mentioned according to their importance to you?

Klaudia:

1. Free shipping plus free convenient return
2. Cheaper prices
3. Availability of choices (model, sizes)
4. Not overwhelming
5. Less time consuming
6. Shops are uncomfortable

Christian: What are you looking for in jackets in terms of specific features or qualities?

Klaudia: I am looking mostly for the suitability for the season, so thickness and warmth. Also, the model is important to me, so it has to fit my style, body and taste. This also includes the length considering my body height. Good material is also important to me. Last but not least a suitable price, which depends on the jacket, but 10-40 Euro is a good deal for me.

Christian: Could you please rank the attributes according to their importance to you?

Klaudia:

1. Model
2. Price
3. Suitability for the season
4. Material

Christian: From which retailer – this time just one – do you typically buy jackets online?

Klaudia: I prefer buying from Shein.

Christian: How often do you buy products from Shein?

Klaudia: Once every 1-2 months.

Christian: Why do you choose this online retailer over others?

Klaudia: The price is very cheap and they have a lot of deals and discounts. You can also check in every day online and get points that can be deducted from the final price on purchase. I could only pay 3 euro from 10 Euro item for example. They

have tons of choices and especially ones that fit my style and taste. Their size fits mine – I'm 150 cm and considered petite. They have free shipping most of the time and a lot of items have free return for 45 days or something.

Christian: Could you please rate your last online shopping experience on a scale from 1 to 10 where 1 is considered awful and 10 excellent?

Klaudia: I would rate it an 8.

Christian: Could you please also provide a short justification for providing this rating?

Klaudia: I bought multiple similar jackets in Zalando for comparison. I returned some but they mixed it up with another item. The good thing is however I ended up paying a bit less than the original price because of their mistake.

Christian: What are major deal breakers for you when shopping for jackets online?

Klaudia: Expensive price, no free shipping and no free return policy.

Christian: Do you have recommendations for brands which would lead you to buy more cloths at their online shop?

Klaudia: Free shipping, free return, offering coupons, filtering options.

Christian: To wrap this interview up could you please provide your age and birth year.

Klaudia: 24, so 1998.

Christian: What gender do you identify with?

Klaudia: Female.

Christian: What is your current professional status?

Klaudia: Working full time in IT.

Christian: Ok thanks that was the last question in this interview. Thank you a lot for your time.

## **Interview#2**

**Interviewee: Tim Maes**

**Interviewer: Christian Keber**

**Date & Time: 20<sup>th</sup> March 2023, 18:00 - 18:20**

**Location: Teams**

**Category: Online Shopper (Bought Jacket Online)**

Christian: Hello, Tim. Thank you for agreeing to be interviewed as part of our master thesis. We are looking into consumer preferences and willingness-to-pay of Generation-Z when it comes to buying jackets, specifically online. Firstly, I would like to ask you whether you are actively buying fashion products online or whether you buy them directly at the store?

Tim: I buy my clothes mainly online because the way to the city and the traffic is too much effort to me and gets on my nerves.

Christian: How frequently do you shop online for fashion products?

Tim: Most of the time I subscribe to newsletters and get lured by the offers. Then I look at the offers and later also at the non-reduced articles. So, it highly fluctuates.

Christian: Ok, so it heavily varies. What would you say is the average frequency?

Tim: On average I would say once every 3-4 months, unless a lot of good sales come around. I also typically buy more products when I actually make purchases.

Christian: Considering our topic focuses on jackets specifically, I wanted to ask if you have bought a jacket online yet? If not, could you please provide a short overview of what kind of products you typically buy?

Tim: I buy almost all my jackets online. I usually order several jackets, try them on and see what I like best. The rest is then sent back completely. I also buy my motorcycle jackets online.

Christian: From which online retailers – you can mention multiple ones here – do you actively buy/look for jackets?

Tim: Mostly I look for jackets on H&M, ASOS and Zara. Motorcycle jackets accordingly on Polo Motorcycle or Louis Motorcycle.

Christian: What would you say are the main reasons for you to buy jackets online?

Tim: Convenience, availability of products, bigger selection, possibility of price comparisons and availability of discounts.

Christian: Could you please also rank these factors you just mentioned according to their importance to you?

Tim:

1. Convenience
2. Possibility of price comparison, as I like to buy cheap products
3. Availability of products
4. Availability of discounts
5. Selection

Christian: What are you looking for in jackets in terms of specific features or qualities?

Tim: Price, jacket brand, material and fabric that's used, availability of a hood, quality, colour, style

Christian: Could you please rank the attributes according to their importance to you?

Tim:

1. Price
2. Material/fabric used
3. Quality
4. Color
5. Style
6. Availability of a hood
7. Brand of the jacket

Christian: From which retailer – this time just one – do you typically buy jackets online?

Tim: H&M.

Christian: How often do you buy from this retailer?

Tim: Every 3-4 months.

Christian: Why do you choose this online retailer over others?

Tim: This online retailer has many different brands and jackets and is often cheaper and has special deals.

Christian: Could you please rate your last online shopping experience on a scale from 1 to 10 where 1 is considered awful and 10 excellent?

Tim: 7

Christian: Could you please also provide a short justification for providing this rating?

Tim: I had to order the item several times because the quality was not good. Once were paint stains on it and the 2nd time glue residue.

Christian: What are major deal breakers for you when shopping for jackets online?

Tim: A too high price, the look and color as well as no free returns are the biggest dealbreakers.

Christian: Do you have recommendations for brands which would lead you to buy more products at their online shop?

Tim: More discounts, better marketing so also potentially including influencers, and also less misguidance through bad newsletters. So this means for instance don't say 40% off in Newsletters as a click bait and then it's just for a few specific products.

Christian: To wrap this interview up could you please provide your age and birth year.

Tim: I'm 24, so born in 1999.

Christian: What gender do you identify with?

Tim: Male

Christian: What is your current professional status?

Tim: Student

Christian: Ok thanks that was the last question in this interview. Thank you a lot for your time.

### **Interview#3**

**Interviewee: Lorenz Wolf**

**Interviewer: Louisa Wolf**

**Date & Time: 21<sup>th</sup> March 2023, 20:00 - 20:20**

**Location: Zoom**

#### **Category: Online Shopper (Bought Jacket Online)**

Louisa: Hello Lorenz. Thank you for agreeing to be interviewed as part of our master thesis. I was giving you a short intro about the field of our masters thesis in advance. The whole interview is going to be anonymized. Firstly, I would like to ask you whether you are actively buying fashion products online or whether you buy them directly at the store?

Lorenz: I am more likely to buy fashion products online.

Louisa: How frequently do you shop online for fashion products?

Lorenz: I rarely shop online, I would say every two to three month.

Louisa: Considering our topic focuses on jackets specifically, I wanted to ask if you have bought a jacket online yet? If not, could you please provide a short overview of what kind of products you typically buy?

Lorenz: I already bought a jacket online, but usually I shop shirts and trousers online.

Louisa: From which online retailers – you can mention multiple ones here – do you actively buy/look for jackets?

Lorenz: In mostly shop at ASOS, as they offer a big portfolio of different brands.

Louisa: What would you say are the main reasons for you to buy jackets online?

Lorenz: The process of buying is easy and convenient, within a few clicks you can order the products. Once delivered, if the products don't fit you can return them easily and convenient.

Louisa: So, in summary the convenience is in the focus for you. Are there any other factors for buying online?

Lorenz: Additionally, some fashion items can only be found online.

Louisa: Could you please also rank these factors you just mentioned according to their importance to you?

Lorenz:

1. Convenience

## 2. Product range

Louisa: As you mentioned, ASOS offers many brands and a wide product range. When it comes to select fashion products, how do you compare these?

Lorenz: Firstly, I decide on the style followed by the price.

Louisa: When shopping a Jacket online, what are you looking for in terms of specific features or qualities?

Lorenz: Quality and durability, and the functionality of the jacket for example when looking for a winter jacket I would want it to keep me warm. And of course the style.

Louisa: Could you please rank the attributes according to their importance to you?

Lorenz:

1. Quality and durability
2. Style
3. Functionality of Jacket
4. Availability of the product

Louisa: When shopping a jacket online from which retailer – this time just one – do you typically buy jackets online?

Lorenz: I don't have any preferences as long as the features I described before are met.

Louisa: You mentioned before that you shop online every two to three months. Would you say that this frequency also fits for ordering on ASOS or do you order on this specific retailer more often?

Lorenz: Okay, I would say I shop on ASOS a little more often as I am already familiar with their process of ordering.

Louisa: Okay so you already answered my next question, why you choose this retailer over others.

Lorenz: Yes, as I already ordered there several times before and more frequently, it is more simple to me.

Louisa: Additionally, what would you say are further benefits? What features offers you this retailer compared to others?

Lorenz: Fast delivery, no delivery fees, broad brand range.

Louisa: Could you please rate your last online shopping experience on a scale from 1 to 10 where 1 is considered awful and 10 excellent?

Lorenz: 6. In general it was okay but the fashion products I ordered didn't fit or didn't look good on me, so I had to return them all.

Louisa: What are major deal breakers for you when shopping for jackets online? At what point are you tending to shop a jacket somewhere else.

Lorenz: If the quality is not good, the fashion product is damaged at arrival or there are any complications in the process of ordering, not so convenient anymore to buy the fashion product.

Louisa: Do you have recommendations for brands which would lead you to buy more products at their online shop? What could brands adapt to be more attractive to consumers?

Lorenz: That's a really good question. Nowadays brands accommodate the needs good, but the delivery fees could be handled better, as they are for some retailers still high.

Louisa: Are there any other benefits a brand could offer, to make you buy from them?

Lorenz: Maybe some more Discounts.

Louisa: Do you have preferences how a brand could communicate those benefits? Do you prefer to get a mail or more likely to read about it online?

Lorenz: I think Social media would be a good way as I am not a big fan of emails and they often end in the spam folder. Or directly on the website of the brand/ retailer to see if there are any promotions.

Louisa: We are already at the end of the interview. To wrap this interview up could you please provide your age, and birth year and gender.

Lorenz: I am 22, born in 2000 and male.

Louisa: Before we close the interview, I lastly also would like to ask you for your professional status.

Lorenz: I am currently a student.

Louisa: I thank you a lot for participating in this interview. That's it.

Lorenz: Thank you.

## **Interview#4**

**Interviewee: Paola W.**

**Interviewer: Louisa Wolf**

**Date & Time: 22<sup>th</sup> March 2023, 10:00 - 10:20**

**Location: Zoom**

### **Category: Online Shopper (Bought Jacket Online)**

Louisa: Hello Paola. Thank you for agreeing to be interviewed as part of our master thesis. I was giving you a short intro about the field of our master's thesis in advance. The whole interview is going to be anonymized. Firstly, I would like to ask you whether you are actively buying fashion products online or whether you buy them directly at the store?

Paola: Both of it. But I prefer to shop online, as I am living in a small town with few possibilities to shop instore.

Louisa: How frequently do you shop online in general?

Paola: I would say every week.

Louisa: Considering our topic focuses on jackets specifically, I wanted to ask if you have bought a jacket online yet? If not, could you please provide a short overview of what kind of products you typically buy?

Paola: I bought many jackets online.

Louisa: From which online retailers – you can mention multiple ones here – do you actively buy/look for jackets?

Paola: In mostly shop fashion on ASOS and Zara.

Louisa: What would you say are the main reasons for you to buy jackets online?

Paola: I would say the broad range of fashion and the time saving process rather than driving to the next store.

Louisa: So in summary the large selection and time saving is the focus for you. Are there any other factors for buying online?

Paola: The convenience of shopping from home and the possibility to shop whenever I want, outside business hours.

Louisa: Could you please rank these factors you just mentioned according to their importance to you?

Paola:

3. Large Selection

4. Flexibility

5. Time saving

Louisa: As you mentioned, you mostly shop on ASOS and Zara. When it comes to select fashion products, how do you compare these?

Paola: For me its all about the style.

Louisa: Let's say you found your style and products to your liking, what would be the next steps to select on fashion products?

Paola: I then look at my favorite brands, as I know exactly the fit of the sizes and the quality. Beside these steps I am not picky.

Louisa: When shopping a Jacket online, what are you looking for in terms of specific features or qualities?

Paola: The wearing comfort, making sure that not every second person wears it (uniqueness), quality and fabrics.

Louisa: Could you please rank the attributes according to their importance to you?

Paola:

5. Wearing comfort

6. Quality and fabrics

7. Not to see it to often on the streets (Uniqueness)

Louisa: When shopping a jacket online from which retailer – this time just one – where do you typically buy jackets online?

Paola: ASOS

Louisa: You mentioned before that you shop online every week. Would you say that this frequency also fits for ordering on ASOS?

Paola: No, as I am ordering also household, electronic, and decoration items beside fashion. I am directly shopping fashion 2 times per month.

Louisa: Okay, why do you choose this retailer? Which benefits offers ASOS to you than others?

Paola: ASOS has a large selection from expensive to affordable brands, and they offer many petit fashion items, so as small person of 1,58 m I prefer shopping fashion on this platform.

Louisa: To summarize, brand selection and different cut lines.

Paola: Additionally the large selection of product categories, as you can find everything you need in fashion.

Louisa: Would you say there are more features offered by this retailer compared to others?

Paola: ASOS offers you a premium membership. I do have it, so I get my order on the next day.

Louisa: Could you please rate your last online shopping experience on a scale from 1 to 10 where 1 is considered awful and 10 excellent?

Paola: 10.

Louisa: Could you describe the reasons for this?

Paola: The easy process of ordering and the fast and secure delivery.

Louisa: What are major deal breakers for you when shopping for jackets online? At what point are you tending to shop a jacket somewhere else.

Paola: If the delivery time takes too long and the shipping would be from China.

Louisa: Do you have recommendations for brands which would lead you to buy more products at their online shop? What could brands adapt to be more attractive to consumers?

Paola: Could you provide me with an example?

Louisa: For example, as young professionals or students we are price sensitive, so discounts could be tempting.

Paola: For me personally, discounts are not that tempting, but I can't exactly tell why.

Louisa: So this could be because when you are in need of a fashion product the price saving becomes irrelevant for you.

Paola: Yes.

Louisa: As you mentioned you care less about discounts. There could be other benefits like fast delivery or other benefit programs. Do you have preferences how a brand could communicate those benefits? Where could brands grab your attention?

Paola: Advertising on online platforms like Instagram, as I am spending most of the time there. But also newsletter via mail. But if a brand is advertising too much and sending out too many newsletters I personally starting to lose interest.

Louisa: Okay, we are already at the end of the interview. To wrap this interview up could you please provide your age, and birth year.

Paola: I am 25, born in 1997.

Louisa: And the gender you are identifying with and professional status.  
Paola: I identify with the female gender, and I am employed of indefinite duration.  
Louisa: I thank you a lot for participating in this interview.  
Paola: You're welcome. Thank you. It was a pleasure and really interesting.

**Interview#5**

**Interviewee: Margarida Peres Pereira**

**Interviewer: Teresa Raposo**

**Date & Time: 20th March 2023, 19:00 – 19:20**

**Location: Teams**

**Category: Online Shopper (Bought Jacket Online)**

Teresa: Hi, Margarida. Thank you for agreeing to be interviewed as part of our master thesis. We are looking into consumer preferences and willingness-to-pay of Generation-Z when it comes to buying jackets, specifically online. Firstly, I would like to ask you whether you are actively buying fashion products online or whether you buy them directly at the store?

Margarida: I do both, but most of the time I buy online.

Teresa: How frequently do you shop online for fashion products?

Margarida: I would say once every 1-3 months, it differs a lot.

Teresa: Considering our topic focuses on jackets specifically, I wanted to ask if you have bought a jacket online yet? If not, could you please provide a short overview of what kind of products you typically buy?

Margarida: Yes, I have bought jackets online before.

Teresa: From which online retailers – you can mention multiple ones here – do you actively buy/look for jackets?

Margarida: Mostly Zara and Mango.

Teresa: What would you say are the main reasons for you to buy jackets online?

Margarida: It's easier to see all the products available and we don't need to go to the store and probably come back without anything .

Teresa: Could you please also rank these factors you just mentioned according to their importance to you?

Margarida:

1. Overview
2. Convenience

Teresa: What are you looking for in jackets in terms of specific features or qualities?

Margarida: I think it's important, a good price, good material, a size that fits well, specific color and specific type.

Teresa: Could you please rank the attributes according to their importance to you?

Margarida:

1. Good price
2. Good material
3. Size that fits well
4. Specific color
5. Specific type

Teresa: From which retailer – this time just one – do you typically buy jackets online?

Margarida: Mango.

Teresa: How often do you buy from this retailer?

Margarida: One time for each six months.

Teresa: Why do you choose this online retailer over others?

Margarida: In my opinion the material is typically better, and the quality-price is good.

Teresa: Could you please rate your last online shopping experience on a scale from 1 to 10 where 1 is considered awful and 10 excellent?

Margarida: 10

Teresa: Could you please also provide a short justification for providing this rating?

Margarida: The delivery was made really quickly, and the clothes were exactly how described.

Teresa: What are major deal breakers for you when shopping for jackets online?

Margarida: Normally, I would say not being possible to return or difficult return policy.

Teresa: Do you have recommendations for brands which would lead you to buy more products at their online shop?

Margarida: No, in all 6 years of experience, everything went well, so I'm satisfied.

Teresa: To wrap this interview up could you please provide your age and birth year.

Margarida: 24, so 1999.

Teresa: What gender do you identify with?

Margarida: Female

Teresa: What is your current professional status?

Margarida: Student

Teresa: Ok thanks that was the last question in this interview. Thank you, a lot, for your time.

## **Interview#6**

**Interviewee: Sofia Oliveira**

**Interviewer: Teresa Raposo**

**Date & Time: 19<sup>th</sup> March 2023, 20:00 – 20:20**

**Location: Teams**

**Category: Online Shopper (No Jacket Bought Online)**

Teresa: Hi,Sofia. Thank you for agreeing to be interviewed as part of our master thesis. We are looking into consumer preferences and willingness-to-pay of Generation-Z when it comes to buying jackets, specifically online. Firstly, I would like to ask you whether you are actively buying fashion products online or whether you buy them directly at the store?

Sofia: I do both, but most of the time In store.

Teresa: How frequently do you shop online for fashion products?

Sofia: I would say two/three times a year.

Teresa: Considering our topic focuses on jackets specifically, I wanted to ask if you have bought a jacket online yet? If not, could you please provide a short overview of what kind of products you typically buy?

Sofia: No, I haven't bought jackets online before.

Teresa: From which online retailers – you can mention multiple ones here – do you actively buy/look for jackets?

Sofia: I have never bought jackets online but I mostly buy fashion products in Inditex group, Brownie and Instagram shops.

Teresa: What would you say are the main reasons for you to buy jackets or in your case fashion online?

Sofia: I think the main reason would be the fact that I want something that is missing on my closet and there's a need to use like blazers when I start working and of course to adapt my closet to the new fashion trends.

Teresa: Could you please also rank these factors you just mentioned according to their importance to you?

Sofia:

1. Need to use
2. Fashion

Teresa: What are you looking for in jackets in terms of specific features or qualities?

Sofia: Maybe comfort and effectiveness .

Teresa: Could you please rank the attributes according to their importance to you?

Sofia:

1. Effectiveness, by this I mean if the jacket for instance warms you enough if you're buying a winter jacket
2. Comfort

Teresa: From which retailer – this time just one – do you typically buy jackets or in your case fashion online?

Sofia: Instagram Shops.

Teresa: How often do you buy from this retailer?

Sofia: Every year.

Teresa: Why do you choose this online retailer over others?

Sofia: Because I like they have products with good quality and they have my type of fashion.

Teresa: Could you please rate your last online shopping experience on a scale from 1 to 10 where 1 is considered awful and 10 excellent?

Sofia: 7.

Teresa: Could you please also provide a short justification for providing this rating?

Sofia: It was nice but it took a while to get to my place

Teresa: What are major deal breakers for you when shopping for jackets online?

Sofia: There are features I may not like once I have them in hand.

Teresa: Do you have recommendations for brands which would lead you to buy more products at their online shop?

Sofia: No.

Teresa: To wrap this interview up could you please provide your age and birth year.

Sofia: 23, so 1999.

Teresa: What gender do you identify with?

Sofia: Female

Teresa: What is your current professional status?

Sofia: Engineer

Teresa: Ok thanks that was the last question in this interview. Thank you, a lot, for your time.

**Interview#7**

**Interviewee: Clara Dietrich**

**Interviewer: Mariella Gradler**

**Date & Time: 19<sup>th</sup> March 2023, 10:00 – 10:20**

**Location: Person**

**Category: Online Shopper (No Jacket Bought Online)**

Mariella: Hi, Clara. Thank you for agreeing to be interviewed as part of our master thesis. We are looking into consumer preferences and willingness-to-pay of Generation-Z when it comes to buying jackets, specifically online. Firstly, I would like to ask you whether you are actively buying fashion products online or whether you buy them directly at the store?

Clara: I prefer buying products at stores, but I still shop online if I need to.

Mariella: How frequently do you shop online?

Clara: Probably, every third month

Mariella: Have you bought a jacket online yet, if not, what kind of products do you typically buy?

Clara: I rarely buy jackets online, but rather shop for products like books or games online instead of clothes

Mariella: Ok so you prefer shopping for fashion in-store. Could you please quickly name the main reason for this?

Clara: The risk of the size not fitting is too high for me.

Mariella: Which online retailers (multiple possible) do you use to buy/look for jackets (fashion) online?

Clara: Either directly on the brands website (Zara) and very rarely on websites like ASOS, Breuninger, Zara etc.

Mariella: What would you say are the main reasons for you to buy jackets (fashion) online?

Clara: Only if the store where I want it from is not close to where I live or if the store does not have it in stock at the moment

Mariella: What are you looking for in jackets (fashion) in terms of specific features or qualities?

Clara: I only shop online if I know my size, as I do not want to return it. So, I buy jackets where the size is unimportant (e.g. coats).

Mariella: Could you please rank these factors according to their importance to you?

Clara: Price, material, size, jacket type.

Mariella: From which retailer (just one) do you typically buy jackets (fashion) online?

Clara: Zara

Mariella: How often do you buy from this online retailer?

Clara: 1-2 a year

Mariella: Why do you choose this online retailer over others?

Clara: I like the styles best in that price range.

Mariella: Could you please rate your last online shopping experience on a scale from 1 to 10 where 1 is considered awful and 10 excellent?

Clara: 4

Mariella: Could you please also give us a short justification for providing this rating?

Clara: The package could not be sent to my apartment, so they put it in a random package shop and did not inform me. It took two weeks to find my package, and I did not like it so I had to return it.

Mariella: What are the primary deal breakers for you when shopping for jackets (fashion) online?

Clara: Delivery time, risk of not liking it or that it does not fit me.

Mariella: Do you have other recommendations for brands which would lead you to buy more clothes at their online shop?

Clara: No.

Mariella: Thank you for your time! Let's close with your demographics. What is your age?

Clara: You welcome, I'm 23.

Mariella: What gender do you identify with?

Clara: Female.

Mariella: What is your current professional status?

Clara: Student.

## **Interview#8**

**Interviewee: Lara van Daalen**

**Interviewer: Mariella Gradler**

**Date & Time: 18<sup>th</sup> March 2023, 13:00 – 13:20**

**Location: Teams**

**Category: Online Shopper (No Jacket Bought Online)**

**Mariella:** Hi,Lara. Thank you for agreeing to be interviewed as part of our master's thesis. As I told you, we are looking into consumer preferences and the willingness-to-pay of Gen Z when it comes to buying jackets, and we are focusing on online purchases. Firstly, I would like to ask you whether you are actively buying fashion products online or whether you buy them directly at the store.

**Lara:** I do both, but mostly at the store directly.

**Mariella:** Could you quickly elaborate on the reason why you prefer stores over online

**Lara:** In a store, I can try the clothes directly, and if I would order online, it could be that it doesn't fit, so I have to send it back.

**Mariella:** Ok, and if you shop online. How frequently do you shop online?

**Lara:** Not much at all, around 3 times a year for specific products I can't find in the store, like shoes or books.

**Mariella:** Have you bought a jacket online yet? If not, what kind of products do you typically buy?

**Lara:** No I haven't, I typically buy shoes, books, and sometimes clothes.

**Mariella:** Which online retailers (multiple possible) do you use to buy/look for jackets (fashion) online?

**Lara:** ASOS because it has many brands that I like, or specific brands on their website for instance, Nike, Zara and Naked.

**Mariella:** I know you haven't bought Jackets online but imagen you would have. What would you say are the main reasons for you to buy jackets (fashion) online?

**Lara:** If I don't find them in-store or if it's only an online shop. Also, some Sales are only available online. Or for instance, if it is a limited collection, I want it before it's out of stock.

**Mariella:** Could you please rank these factors according to their importance to you?

**Lara:** First Exclusively, second sold online, and third secure limited collection item

**Mariella:** What are you looking for in jackets (fashion) in terms of specific features or qualities?

Lara: Good material quality (natural), special colors or models, good pricing

Mariella: Could you please rank these attributes according to their importance to you?

Lara: Quality, Price, Color, Material

Mariella: From which retailer (just one) do you typically buy jackets (fashion) online?

Lara: ASOS

Mariella: How often do you buy from this online retailer?

Lara: Once or twice a year

Mariella: Why do you choose this online retailer over others?

Lara: Because it has all the brands I am looking for, and usually has a big selection of products. Also, I can send it back for free if there is a problem or it doesn't suit me.

Mariella: Could you please rate your last online shopping experience on a scale from 1 to 10 where 1 is considered awful and 10 excellent?

Lara: 9

Mariella: Could you please also give us a short justification for providing this rating?

Lara: It was for two pairs of shoes; I got them in less than a week, and they suited me well. I just hadn't seen a detail of one of the pairs in the pictures that I didn't like too much.

Mariella: What are major deal breakers for you when shopping for jackets (fashion) online?

Lara: If the delivery takes too long if the delivery is too expensive, if there is no information on the article's measurements.

Mariella: Do you have other recommendations for brands which would lead you to buy more clothes at their online shop?

Lara: More detail on the product (fabric, measurements), More videos of the article (360° style), Easy and cheap delivery, showing different models for the products.

Mariella: Ok thank you for your time! Let's close the interview with your demographics. What is your age?

Lara: You welcome; I'm 24.

Mariella: What gender do you identify with?

Lara: Female

Mariella: What is your current professional status?

Lara: Student



## **Interview#9**

**Interviewee: Mariana Ferreira**

**Interviewer: Mariana Miller**

**Date & Time: 20<sup>th</sup> March 2023, 19:00 - 19:30**

**Location: Teams**

**Category: Online Shopper (bought Jacket online)**

Mariana M: Hi, Mariana. Thank you for agreeing to be interviewed as part of our master thesis. We are looking into consumer preferences and willingness-to-pay of Generation-Z when it comes to buying jackets, specifically online. Firstly, I would like to ask you whether you are actively buying fashion products online or whether you buy them directly at the store?

Mariana F: I buy both in store and online.

Mariana M: How frequently do you shop online for fashion products?

Mariana F: I would say every 3 months

Mariana M: Considering our topic focuses on jackets specifically, I wanted to ask if you have bought a jacket online yet? If not, could you please provide a short overview of what kind of products you typically buy?

Mariana F: I have bought a jacket online, but it was thrifted. So, it was a jacket from Zara, but I didn't buy it directly from the Zara website, I bought it second hand online from Vinted. I would say that when I shop online, I am mostly looking for T-shirts and blouses, so things I'm more confident that the size and fitting will be correct.

Mariana M: From which online retailers – you can mention multiple ones here – do you actively buy/look for fashion?

Mariana F: Usually I go online to look for and shop from brands that we don't usually have here in Portugal, so mostly I buy from ASOS and YesStyle. Although I also occasionally shop from other varied online retailers, for instance if I see an influencer I follow and I like something they are wearing I go to the website they mention and go check it out.

Mariana M: What would you say are the main reasons for you to buy jackets online?

Mariana F: First, convenience. Online is better for time management, especially during sales, there are so many people in store, and everything is displayed all over the place, this makes shopping harder and takes longer, so online is more convenient, faster and efficient. Second to check for product comparison, for instance if I'm looking for a basic white jacket, I can check online the different white jackets available across different brands (whereas if I was in store, I'm restricted to the stores the mall has, online I have infinite options). Also online is more useful for price comparison between brands.

Mariana M: Could you please also rank these factors you just mentioned according to their importance to you?

Mariana F:

1. Convenience – time management and organization
2. Product comparison
3. Price comparison

Mariana M: What are you looking for in jackets in terms of specific features or qualities?

Mariana F: First quality. I want a jacket that I know it's good quality and made up of good and durable materials. However, price is also important to me. I want to have a balance between price and quality. I don't mind spending a bit more in a jacket, but it is very important to me that the price is representative of the quality. Also, I also try to look for more sustainable brands. Although usually sustainable brands are more expensive, their items have better quality and materials. So, I always try to balance between these three factors quality, price and sustainability.

Mariana M: Could you please rank the attributes according to their importance to you?

Mariana F:

1. Quality and durability
2. Price
3. Sustainability

Mariana M: From which retailer – this time just one – do you typically buy fashion online?

Mariana F: ASOS

Mariana M: How often do you buy from this retailer?

Mariana F: Once or twice a year

Mariana M: Why do you choose this online retailer over others?

Mariana F: ASOS offers a wide variety of items, there are many brands available on their website. There's everything from good quality brands to cheaper brands, so this makes product and price comparison much easier and allows to have a greater selection of products.

Mariana M: Could you please rate your last online shopping experience on a scale from 1 to 10 where 1 is considered awful and 10 excellent?

Mariana F: 8.

Mariana M: Could you please also provide a short justification for providing this rating?

Mariana F: On the website it was stated that I wouldn't have to pay customs for my items, however I did. Even though this was unexpected, and I was surprised with having to spend more money for my package, when I complained to the brand I was given store credit for the value I had spent on customs, so I think that was a good solution to compensate for the error.

Mariana M: What are major deal breakers for you when shopping for jackets online?

Mariana F: No return policy, no free returns, also expensive shipping and having to pay for customs.

Mariana M: Do you have recommendations for brands which would lead you to buy more products at their online shop?

Mariana F: Offer coupons, for instance "sign for newsletter and get 10% discount", online deals and price reductions. Also, using influencers - many times I find myself shopping online for fashion items because I saw an influencer, I follow wearing it. For instance, if I see an influencer, I follow wearing something I really like, I'm more likely to go online to look for it and potentially buy it.

Mariana M: To wrap this interview up could you please provide your age and birth year.

Mariana F: 23, so 1999.

Mariana M: What gender do you identify with?

Mariana F: Female

Mariana M: What is your current professional status?

Mariana F: Student

Mariana M: Ok thanks that was the last question in this interview. Thank you a lot for your time.

## **Interview#10**

**Interviewee: Marta Inocência**

**Interviewer: Mariana Miller**

**Date & Time: 20<sup>th</sup> March 2023, 18:30 - 18:50**

**Location: Teams**

**Category: Online Shopper (Bought Jacket Online)**

Mariana: Hi, Marta. Thank you for agreeing to be interviewed as part of our master thesis. We are looking into consumer preferences and willingness-to-pay of Generation-Z when it comes to buying jackets, specifically online. Firstly, I would like to ask you whether you are actively buying fashion products online or whether you buy them directly at the store?

Marta: I do both, but most of the time I buy online.

Mariana: How frequently do you shop online for fashion products?

Marta: I would say once or twice a month.

Mariana: Considering our topic focuses on jackets specifically, I wanted to ask if you have bought a jacket online yet? If not, could you please provide a short overview of what kind of products you typically buy?

Marta: Yes, I have bought jackets online before. Most of the jackets I buy online are cardigan and sweater jackets, but I have bought other jacket types as well.

Mariana: From which online retailers – you can mention multiple ones here – do you actively buy/look for jackets?

Marta: Mostly Zara and Mango.

Mariana: What would you say are the main reasons for you to buy jackets online?

Marta: First, convenience, it's easier for me to buy online and have them delivered, than having to go to the store. Also, there are many online discounts available that you don't have in-store and finally the display of products is much better online. For instance, in store, you have to go look for the items yourself, while online everything is much more organized and well displayed: there are many

filters you can apply regarding colors and sizes that make it easier to look for things, compare items and consequently, make a decision.

Mariana: Could you please also rank these factors you just mentioned according to their importance to you?

Marta:

1. Convenience
2. Organization and display of products- possibility of applying filters
3. Online discounts

Mariana: What are you looking for in jackets in terms of specific features or qualities?

Marta: First of all, quality and durability of the jacket and even versatility of the jacket. For instance, when I look for a jacket, I prefer if this is an item that I can use on several occasions, for example a jacket that can be used in a casual event but also that would be suitable for a more formal occasion. While I do look for a good quality jacket, I also am a bit price conscious, so price is also important to me. I would say a balance between price and quality is essential.

Mariana: Could you please rank the attributes according to their importance to you?

Marta:

1. Durability and quality
2. Price
3. Versatility

Mariana: From which retailer – this time just one – do you typically buy jackets online?

Marta: Zara.

Mariana: How often do you buy from this retailer?

Marta: Twice a month

Mariana: Why do you choose this online retailer over others?

Marta: To me Zara offers the most variety of products, you can buy casual jackets, formal and work jackets, also jackets that are more suitable for parties and even

outdoor jackets. Besides, the quality/price balance is to me the best of all retailers.

Mariana: Could you please rate your last online shopping experience on a scale from 1 to 10 where 1 is considered awful and 10 excellent?

Marta: 10

Mariana: Could you please also provide a short justification for providing this rating?

Marta: I had a good experience, because everything went according to my expectations. The shopping experience was very practical, and the platform is very user friendly, for example the payment is very easy, especially if you already have an account all details are automatically filled in, so it is really easy and fast to shop. Also, shipment was really fast and so far it has always arrived on time.

Mariana: What are major deal breakers for you when shopping for jackets online?

Marta: Usually when the brand does not state which size the model is using in the picture. If I already know my size in a brand that I usually shop at, usually it's okay, but when I'm looking at a new brand or a brand, I don't really know my size, it is hard to convey the specific size by just by looking at the picture. Also, when the pictures don't convey the right message and the sizing is not very well explained I end up buying the wrong size and having to return the item.

Mariana: Do you have recommendations for brands which would lead you to buy more products at their online shop?

Marta: Display the size of item the model in the picture is wearing. For example, sometimes I may look at the model for size referencing and this is not showcased. It is much easier for me to compare sizes and choose the fit I want when I know if the model is wearing a size S or M, for instance.

Mariana: To wrap this interview up could you please provide your age and birth year.

Marta: 22, so 2000.

Mariana: What gender do you identify with?

Marta: Female

Mariana: What is your current professional status?

Marta: Student

Mariana: Ok thanks that was the last question in this interview. Thank you a lot for your time.