BRICK AND MORTAR 2.0:
THE FUTURE OF BRICK-AND-MORTAR FASHION RETAIL

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Introduction

An unprecedented number of brick-and-mortar stores have filed for bankruptcy—Toys “R” Us, Sears, Payless, and Rue 21 to name a few—leading some to declare the death of retail as we know it. These claims reached full swing in 2017, a record year for store closures nearing the 9,000 mark (Fabregas, 2018). Many infer the growth of online shopping to be the cause of the perceived decline of brick and mortar. Amazon has a great deal to do with this phenomenon, with its significant and growing share of the e-commerce market. However, understanding certain facts can prove that correlation does not equal causation. In truth, 85.7% of retail sales still occur in brick-and-mortar stores and online transactions actually make up less than 10% of American quarterly retail sales (GoSpotCheck, Inc., 2019; Dolan, 2018). The erroneous conjecture that online shopping is completely replacing traditional shopping creates a general consensus among the public and industry-watchers that traditional retail will soon disappear. It is important to understand that the current state is merely an evolution.

As the times change, retail must change with it. However, the foundation of brick-and-mortar fashion retail has always remained the same; a space for consumers to touch fabric and try on items for fit and appeal before making a decision. What changes is *how* the product is presented to get customers in the door. The great strides being made by retailers STORY, Galeries Lafayette Haussmann, the Rebecca Minkoff flagship store and Amazon Go in terms of customer experience and advancements in retail technology demonstrate that consumers crave engaging experiences which allow them to interact with the product. The fashion industry is driven by the consumer, so who exactly is this customer changing the face of retail?

Enter Generation Z. The newest cohort of consumers bringing their own unique set of preferences and expectations to the retail marketplace. Born in 1995 or later, Generation Z (Gen Z) is soon to be the largest living generation and as early as 2020, will constitute 40% of all U.S. consumers (Cheung, Glass, Haller, & Wong, 2018; Van Buskirk, 2018). This group highly values the in-store shopping experience because they want to see, touch and try on the item before making a purchase (Van Buskirk, 2018). In fact, 75% of "Gen Zers" spend over half their monthly income with most of their spending going toward apparel (Cheung, Glass, McCarty, & Wong, 2017b). Already, this generation is becoming an influential consumer cohort for fashion retailers and to not know Generation Z places a brand at considerable financial risk.

The challenge is to explore the optimal brick-and-mortar retail format for fashion brands in the near future. Meaning what these brands should do to capture and captivate growing numbers of Generation Z, who will be the driving force behind the success of physical stores. The fundamental purpose of every company is to provide value to its customers and stakeholders (Hyun, 2020). Brands that research their target consumer's shopping behavior, preferences and expectations will be in a stronger position to tailor customer experiences and generate value. Without research, brands risk investing in efforts that do not resonate with the customer, wasting funds, losing sales, and eventually slipping into obscurity, bankruptcy and obsolescence. It is essential that fashion retail professionals conduct research and share recommendations for better understanding of how shopping will be done in the near future; thereby developing concrete strategies that resonate with Generation Z.

Statement of the Problem

To explore and provide industry insights for the future of retail shopping, this study investigates three important areas: aspects of brick-and-mortar shopping that bring the most value to emerging groups of consumers, attributes of the customer experience that have determined success in the market today, and the best practices brick-and-mortar fashion retailers should adopt to meet consumer needs long-term.

The first area pertains to what Generation Z consumers want and aspects of the customer experience they believe provide the most value when evaluating the retail experience. Gathering data directly from this population lends invaluable information to retailers to tailor products and services to customers' needs. This brings them more value and increases loyalty, which are all crucial aspects for a brand's long-term success. The pit many unsuccessful retailers have fallen into is failing to understand what the customer wants, her lifestyle, what she cares about, as well as the zeitgeist, or *spirit of a time*. As a result of doing things the way they have always been done, many retailers have failed to adequately provide relevant products and services, foster repeat purchases or build meaningful connections with emerging consumer groups.

The next part deals with what some successful retailers are currently doing in terms of customer experience, products, services or initiatives that have resonated with customers and generated profitable results. The retailer STORY's focus on experience is unmatched with its fun rotating themes and interactive products. The eco-friendly and socially responsible collection by French department store Galeries Lafayette Haussmann has encouraged consumers to buy sustainably. Rebecca Minkoff and Amazon Go are both on the cutting edge of retail technology by providing greater convenience for customers in innovative ways. Providing value translates to profits and loyalty and these efforts can provide insight as to what will appeal to Generation Z customers long-term. Retailers who fail to analyze their initiatives and products to see what is and is not working for their customer will also fail in providing the best experience or product relevant to customer needs. They ultimately waste time and capital on underdeveloped efforts while watching their shoppers go elsewhere.

The final point combines the research from the first two sections to suggest what technology, products, services and physical characteristics retailers should adopt or build upon to meet Generation Z consumer needs for the future. This section is most directly related to the problem because it is essentially a blueprint for the layout and offerings of the store of the future before it even opens its doors. By not knowing what lies ahead for the retail industry and shopping itself, stores have become stagnant. Fashion retailers who are unable to understand and address Generation Z, advance with the technology of the times, harness these points to get ahead of their competition or provide the best products and services for this market will continue to disappear.

The following research questions will address each element of the problem and guide this study:

1. What aspects of brick-and-mortar shopping do consumers, specifically the Generation Z cohort, value most when evaluating their customer experience?
2. What aspects of the current customer experience determine success for retailers?
3. What best practices should brick-and-mortar fashion retailers adopt or build upon, in terms of technology, products, services and physical characteristics, to adapt and meet Generation Z consumer needs long-term?

Purpose of the Study

As previously stated, recent years have brought with them a tumult of naysayers who declared the death of traditional retail with an unprecedented number of retail store closures, particularly in the fashion industry. Even though statistics say otherwise, no one can escape the fact that retail as we know it is changing. Research is essential to determine the “how”; how retail is changing and how retailers can adapt for the future. Despite considerable coverage in the industry and popular press, there remain gaps in the literature on this topic. In an age of data analytics based on purchases, very few studies have directly asked Generation Z shoppers what they want from the retail environment. Moreover, none were identified that specifically asked fashion students—our future industry professionals—what they want to see from fashion retailers. This study is timely as Gen Z consumers are beginning to develop significant and general characteristics and shopping behaviors for industry researchers to analyze.

The solution to these gaps and the central problem can be explored by conducting research focusing on college students taking courses in fashion to better understand what

Gen Z shoppers want from brick-and-mortar fashion retailers. Therefore, the purpose of this study was to investigate and better understand the Gen Z consumer's shopping behavior, preferences, and expectations for the brick-and-mortar store by surveying students taking college-level fashion courses. Fashion students are educated consumers with a comprehensive understanding of the retail and fashion industry because of their curriculum. These emerging professionals are expected to put more critical thinking into how they shop, since apparel is a significant part of their education. In fact, the mission of The Fashion School at Kent State University is "Inspiring Creative and Resourceful Fashion Leaders" ("Missions and Goals of The Fashion School," 2020).

Findings of this research will inform initiatives related to technology, products, services and physical characteristics that fashion retailers must consider to meet evolving customer needs. This study provides a comprehensive view into what emerging professionals, specifically college-age consumers, think and want successful fashion retail shopping to look like in the near future. The stakes are quite high. If retailers disregard what Gen Z consumers have to say, the future of traditional shopping will become even more precarious and uncertain. Learning the customer is a key predictor of a company's success.

Definition of Terms

Artificial Intelligence (AI) — A system that "finds patterns in raw, unformatted data and draws meaning from what the data reveals, independent of human bias. The more data it is fed, the better AI performs"

	(Retail Dive's Brand Studio, 2019, p. 11). Making it possible to collect invaluable information about consumer behavior and purchase data faster and more accurately than any human ever could (Pearson, 2019).
Brand Enthusiasm	Level of engagement between the brand and consumers, which allows for insight into consumer preferences, behaviors, and attitudes toward the brand (Cheung, Davis, & Heukaeufer, 2017a). Not to be confused with brand loyalty.
Brand Loyalty	Number of repeat purchases by a consumer to a particular retailer (Cheung, et al., 2017a). Not to be confused with brand enthusiasm.
Brick-and Mortar Store	The physical retail location of a business (a.k.a. traditional retail) ("Brick-and-mortar," n.d.).
Channel/Platform	Medium through which a retail transaction is made; the two most prominent, which will be referenced throughout this study, being online and in store (Bhaduri, 2016).
Concept Store	Owned by a designer or creative person which aims to tell a story through a selection of designer garments (Vannuccini, 2018).

Consumers	Those with direct purchasing power (Van Buskirk, 2018).
Experientailer	Amalgam of the words “experience” and “retailer” used only for the purposes of this thesis to describe brick-and-mortar stores whose devotion to the customer experience is an inextricable part of their brand.
Fashion Retailer	In the context of this thesis, this term is defined as a store or chain that specializes in the latest trends primarily of apparel, but may also offer footwear, accessories, or beauty.
Fashion/Retail Industry	“…beginning with the creators and providers of raw materials and the manufacturers of products, followed by the manufacturer’s designers who develop the concepts that will be produced to the retailers who create and/or sell the products to the consumers, and ending with the auxiliary industries that support the work done by the product creators and product retailers” (Granger, 2015, p. xxi-xxii). This thesis will focus on the part of the industry where retailers sell products to consumers.
Personalization	“Driven by the brand to tailor consumer shopping experiences based on known customer segment

	preferences, behaviors and history" (Cheung, et al., 2018, p. 8).
Physical Characteristics	Broad term and includes the architecture, layout, signs and displays, colors, lighting, temperature, sounds, and smells of a particular retailer (Bhaduri, 2016).
Retail Format	The type of products and services a retailer offers as well as its promotion programs, store design, and visual merchandising that meet the needs of its target market (Levy & Weitz, 2012).
Value	The relationship between the perception of benefits associated with products or services and what buyers are willing to pay for them (Hyun, 2020). When customer needs are met through the provision of relevant products and services, value occurs.
Zeitgeist	German word meaning "the defining spirit or mood of a particular period of history as shown by the ideas and beliefs of the time" (Marsh, 2019, slide 10).

Review of Literature

Retail industry leaders and other stakeholders have long recognized the seismic changes resulting from rapid adoption of technology and changing consumer preferences. Younger generations are actively participating in and significantly influencing the market. To meet the demands of the future fashion retail landscape, the industry must get to know this growing customer base, determine what they want and develop strategies to deliver value. To understand the context of this research, literature was reviewed on the topics of generational characteristics and data, important facets of the customer experience and leading retail formats.

The literature review will address three areas related to the future of brick-and-mortar fashion retail and provide deeper understanding needed to answer the research questions. The first section delves into the unique psychographics, shopping behavior and reports found for the Generation Z cohort. This section touches on the question of what this generation of consumers values most in the shopping experience. The next part will focus on the most important aspects of the customer experience, including immersive experiences, personalization and new technology being using in retail today. This portion addresses aspects of current retail formats that have proven profitable in providing the best customer experience. Finally, the last section will discuss research related to retailers leading the industry in technology and customer experience. It will lend invaluable foundational information to answer the question of best practices for fashion retailers to adopt to meet consumer needs long-term.

Generation Z

Understanding generational cohorts is important in addressing consumer opportunities and challenges and measuring their attitudes and behaviors. While Generation Zers might have limited spending power right now, these individuals, born after 1995, already have significant influence over family purchase decisions with apparel constituting a large proportion of what they buy (Cheung, et al., 2017b). To meet needs and provide value, it is necessary for retailers to understand Generation Z psychographics, shopping behavior and expectations. Success for retailers in the future means being able to use this information to anticipate demands and appeal to this cohort today. This way, a brand can position itself at the top of the consideration sets of Gen Z consumers to motivate purchases now and in the future when they will have increased spending power.

Shopping behavior. All generations have unique characteristics and shared life experiences, and Gen Z is no different. Not remembering a time without smartphones, this cohort has been dubbed “digital natives” (Guillot, 2018, para. 4). This is especially true for the Gen Zers aged 19-21 who came into the world with iPods, which first came out in 2001, and iPhones, which were introduced in 2007 (Smith, 2012). Smartphones in particular have shaped current and future expectations in the retail marketplace. For example, frequent use of devices and high-speed connectivity have diminished patience for slow service (Cheung, et al., 2018; Guillot, 2018). This highly digital generation has also come to expect a seamless transition from the online to in-store shopping experience (Van Buskirk, 2018). This means being able to switch between platforms with ease and quickly able find products, access information and pay without delay (Cheung, et al., 2018). If these expectations are not met, the Gen Z customer knows they have other options, which include purchasing online or take their business to a better-prepared competitor.

However, Generation Z's attachment to smartphones and devices does not mean these consumers prefer shopping online. On the contrary, about 72% prefer to buy clothes in brick-and-mortar stores, more so than other generations (Salfino, 2018; Van Buskirk, 2018). Even though they might research a product online, deciding factors for a purchase come from seeing, touching, and trying on the item (Van Buskirk, 2018). An emerging reality is that in the near future, retailers will largely be serving the Generation Z cohort as the soon-to-be largest living generation. With literature revealing that nearly all of these consumers shop in store at least part of the time, each and every retailer must take action to stay competitive.

Loyalty. These days, it will take more than just product on racks to get Generation Z in the door. Ways to build loyalty with this generation include creating engaging experiences, personalization and offering in-store specials. According to Van Buskirk (2018), "nearly one in two Gen Zers say the experience of buying something is just as important as the product itself" (p. 8). It is important for retailers to invest time and money in creating experiences rather than just focusing on getting merchandise in the store. A significant number of Gen Zers also want their individual needs to be met. In fact, a greater proportion of Gen Z shoppers expect a more personalized experience based on their shopping behavior than any other generation (Guillot, 2018). Addressing shopping habits and preferences are key for a fashion retailer to create a unique experience that these customers desire, complete with tailored services, technological features and the option of product customization. Van Buskirk (2018) also found that Gen Z is more attracted to in-store specials, sales and discounts rather than rewards or loyalty programs. It seems a decrease in the price of an item at the moment of purchase is more important than accumulating points for a long-term reward to Gen Z shoppers.

Sustainability. Gen Zers align with brands that reflect their values and are transparent in business practices. They are a part of the growing demand for sustainable products, which directly impacts their buying behavior because a significant portion actively seek out environmentally or socially responsible brands (Salfino, 2019). Transparency builds trust among consumers who have grown up in the age of "fake news" where even the most baseless claims are presented as fact (Cheung, et al., 2017a). In fact, 94% of Gen Z shoppers in a survey conducted by Cone Communications said companies should address urgent social and environmental issues, and many feel connected to brands that offer sustainable clothing (Salfino, 2019). Brands able to address the concerns of this generation open themselves up for success.

Take Patagonia. Respondents ranked Patagonia as a "top purpose-driven brand" in a 2018 study conducted by DoSomething Strategic, a social impact consultancy (Salfino, 2019, para. 3). A prime example of the brand's purpose was its Black Friday marketing campaign "Don't Buy This Jacket," which actually encouraged people to buy less, including the jacket in the ad, and shed light on the harmful effects of consumerism (Patagonia, 2011). In addition, the brand has created a marketplace for selling used clothes and designed a digital platform that allows people to choose specific environmental issues they care about and find ways get involved in their area (Salfino, 2019; Kim, 2018). But has telling potential customers to hold off on buying new clothes hurt their bottom line as an apparel retailer? Not at all. In fact, DoSomething Strategic stated the company has "doubled its revenue in the last eight years" (Salfino, 2019, para. 3). Patagonia found a way to authentically tap in to the causes its customers care about and produce meaningful results, which add value to their customers' lives. Patagonia aligning with Generation Z values is more than just another brand trying to turn a profit; the whole organization *lives* the brand's core values.

Customer Experience

The experience of shopping has become more important for customers and retailers following the bankruptcy of numerous brands and department stores in recent years. A sense of gloom and doom has been cast over the future of shopping at physical stores. Challenged but not gone, the retail industry is constantly evolving and the customer experience with it. A proven winning strategy is providing an immersive and engaging experience while fusing the best aspects of the digital experience into the physical store. According to Cotton Incorporated's *Lifestyle Monitor* Survey, over half of Generation Z respondents would like brands to do just that (CottonWorks, 2019).

An example of successfully creating engaging experiences was *12 Days of Gaga*. A promotional partnership between retailer Barneys New York and marketing agency Digital Surgeons, the initiative was designed to drive holiday sales by increasing store traffic, product sales and social media engagement. The multi-pronged event centered around Lady Gaga included a website with new offerings revealed each day, an entire floor of Barneys' Madison Ave flagship dedicated to sell more than 170 different Gaga-themed products and a launch event in locations across New York City (Diorio, 2016; Yannetta, 2011). This well-planned and executed effort produced a 70% increase from the previous year's holiday sales and over four billion in earned media impressions worldwide. Digital Surgeons helped Barney's perfectly blend digital, social, and experiential elements to increase traffic in-store and create experiences that generated interest and engagement (Diorio, 2016; Horyn, 2012).

Personalization. Studies have shown that more than a quarter of Generation Z consumers (26%) expect a more personalized shopping experience; the most of any generation (Guillot, 2018). However, what does personalization currently look like in the retail store? Jo-Ann Fabric and Craft Stores and the Container Store have made efforts to make the shopping experience much more personal and tailored to each customer's needs. Jo-Ann's loyal shoppers come to a store to have an associate custom cut fabric to length (Thomas, 2018a). In the revamped experiential-enhanced store, shoppers check in with a mobile device at a bar and do their shopping until the material is ready for pick up. Comparatively, the Container Store looked at its online business to identify areas of the brick-and-mortar store to increase investment and maximize potential (Thomas, 2018b).

Many customers come to this company's website looking for projects and inspiration, so they created an in-store custom closet studio, which allows shoppers to organize a layout that best fits their space. The Container Store also invested in digital design screens where shoppers create their own organizational structures and peruse inventory. Investing in technology that creates a seamless transition between digital and physical platforms is the driving force behind personalization in the retail industry.

Yet, while various studies have shown Gen Z shoppers expect a more personalized experience, only 53% of retailers are "focused on personalization as a top customer engagement priority" (Guillot, 2018; Zaczkiewicz, 2019, para. 2). Personalization is clearly a growing desire of generations and a key part of offering an engaging experience in the future. Personalized features add value for the customer and create a successfully tailored experience with Gen Z.

Innovative Technology. Technology can be utilized an infinite amount of ways in the retail store, but it must be implemented in a way that brings value for both the retailer and customer. For the retailer this could mean driving sales, streamlining operations and reducing labor, and for the customer, greater convenience and staff who have more time to help (GoSpotCheck, Inc., 2019).

Digital Interiors. By mirroring the online shopping experience, several retailers have taken steps to remake their interiors to become much more visual and digital. Rather than static printed signs, digital signage can change or feature interactive content to enhance the shopping experience (GoSpotCheck, Inc., 2019). Grocers like Whole Foods

Market are adding digital signage to their shelf tags and doing away with paper price signs completely. This is a much more efficient way of updating price or nutritional information and allows the grocer to make changes and immediately send to their other businesses. Along the same line, during the 2017 holiday season, Neiman Marcus partnered with Perch Interactive to set displays in retail shelving that can detect the products customers touch (Groeber, 2018). The displays respond with everything ranging from videos, styling tips, ratings, reviews and omnichannel ordering with product personalization. They increased sales anywhere from 30% to 80% by boosting brand enthusiasm and interaction with the product and store features. By providing a convenient way to check reviews and how-to's as if shopping online, this service facilitates decision-making by mitigating purchase risk for the consumer.

AI. Supporting the idea of the "connected" store, Pearson (2019) believes the key for the physical store is to integrate all the best parts of the online experience, specifically through artificial intelligence. Amazon Go set the stage by using tracking technology to recognize what items shoppers pick up or put back on the shelf, allowing them to leave the store without waiting in line to check out. Other retailers like Lowe's and Walmart have invested in robots for in-store inventory scanning and other functions (Morgan, 2019). Already, AI is a quickly growing trend that has drastically changed the traditional retail experience. According to International Data Corporation, the retail industry is estimated to have invested $3.4 billion in artificial intelligence in 2018, more than any other industry (Pearson, 2019). More than a few retailers have seen the benefit of investing in technology that revolutionizes the customer experience.

What does AI currently look like in the brick-and-mortar fashion retail store and what are the implications for the future customer experience? Fashion retailers Ralph Lauren and Rebecca Minkoff have outfitted their fitting rooms with smart mirrors that recognize items a customer brings in and gives her the power to adjust the lightning and request different sizes and colors (Pearson, 2019). To streamline the process of buy online/pick up in store purchases, Zara has starting using robots in store to find and deliver its customers' orders to a drop box. This is just the tip of the iceberg; many more fashion retailers are investing in AI and competing to be leaders in the industry. AI can deliver and exceed customer expectations, but the technology is still in the early stages of development and high cost is a major factor (Pasquarelli, 2018). With rapid adoption by retail giants, in addition to favorable customer response, brick-and-mortar fashion retail points toward a future powered by AI.

According to a survey by a retail management consulting firm, consumers shopping online are accustomed to features such as product reviews, quick transaction processing and personalized recommendations and carry the same expectations to the physical store (Zaczkiewicz, 2019). Judging from the plethora of examples provided in this section, fashion retailers are using AI and other strategies to narrow down promotions and products that are working and target shoppers accordingly. This creates a more efficient business, which saves the consumer time and money, and results in greater convenience, ease of shopping, personalization and a better customer experience (Pearson, 2019). Determining which strategies to employ to best meet Generation Z needs while staying on-brand is key.

Gen Z Market Reports

Anticipating the colossal impact Generation Z would have on the market, The National Retail Federation (NRF) and the IBM Institute for Business Value (IBV) teamed up to produce a series of reports regarding the Generation Z customer. Conducting a global survey of 15,600 Gen Zers between the ages of 13 and 21, the partnership explored technology preferences, brand relationships, expectations and the best ways to create authentic brand experiences to which this cohort responds (Cheung, et al., 2017b). These reports support scholarly and popular literature, providing one of the most comprehensive and meaningful resources that fashion retail can employ to understand what Gen Z customers actually want from brands.

The first in the series, entitled *Uniquely Gen Z*, focused on this generation's technology preferences. The next to enter full-time employment and adult consumer spending, Gen Zers aged 19 to 21 use their smartphones and shop online more than any other age range within the generation (Cheung, et al., 2017b). When they do shop in-store this cohort has come to expect a seamless transition between online and offline worlds. The generation's ingrained usage of devices, practically since birth, has shaped this expectation (arguably more so for Gen Zers aged 19 to 21 based on their level of smartphone usage and online shopping frequency).

This generation places priority on shopping, particularly for apparel and accessories. 75% spend more than half of their monthly income, and over half of them spend that money on clothes and shoes (Cheung, et al., 2017b). Of course, this generation largely consists of dependents, and Gen Z is just touching the start of its consumption. Furthermore, Gen Zers choose brands that are eco-friendly and socially responsible and quality products matter to them. This report supports the premise that Generation Z features technologically oriented consumers, who are influential in the apparel marketplace, and value quality and commitment to sustainability in their customer experience.

The second installment, *Gen Z Brand Relationships*, details how this cohort interacts with brands and their expectations. While it is important that all types of customers find an emotional connection to a brand, overall, Gen Zers are less likely to be brand loyal than other generations (Cheung, et al., 2017a). If a brand is slow to engage or breaks this cohort's trust, they will switch to a competitor without hesitation (Cheung, et al., 2017a; Diorio, 2016). However, there is hope with a subset of this cohort: 46% of those aged 19-21 say they have a strong connection to a brand, more than any other age category of the Generation Z respondents (Cheung, et al., 2017a). This is most likely due to a stronger understanding of individual preferences and consumer identity.

The NRF report addresses some key points necessary to connect with these consumers: authenticity and creating brand enthusiasm (Cheung, et al., 2017a). An example for encouraging engagement includes an opportunity to submit ideas for product design. Generation Z shoppers want to feel a brand values their opinion. This report suggests that to create a connection with Gen Z customers, brands must do it on their terms; make shoppers a part of the conversation, take their opinions into consideration, and be transparent.

The final report *What Do Gen Z Shoppers Really Want*? is an extensive exploration of attitudes toward technology and consumer expectations. While in the store, Gen Zers use their mobile devices to comparison shop, shop online for items that might not be in stock in the store, and look up discounts and product information (Cheung, et al., 2018). Technology in the retail environment is important to them, but only if it adds value and facilitates a “frictionless shopping experience,” like providing added convenience or incorporating robotics (Cheung, et al., 2018, p. 7). Gen Zers use their devices to make informed purchase decisions and find value; they logically want the same when it comes to retail technology (Cheung, et al., 2018).

When it comes to choosing where to shop, wide product choice, product availability and convenience were seen as top priorities with product choice being the most important factor (Cheung, et al., 2018). However, in terms of the most important factors *when* shopping, speed of finding products and value (i.e. finding the best deals) become the highest priorities, in addition to convenience and product availability. Convenience and product availability were seen as important factors in both scenarios most likely because these respondents want an generally frictionless shopping experience. The desire for value supports the fact that these shoppers crave price decreases rather than loyalty programs when shopping online or in the brick-and-mortar store.

Leading Retail Formats

Retailers concentrating their efforts on engaging customer experiences, using technology to pioneer a new wave of retail and/or adding value to the *lives* of their consumers, not just through product alone, are models for the future of brick and mortar. For "experientailers" STORY and Galeries Lafayette Haussmann the customer experience is not just delegating a percentage of their budget in order to get a greater return, it is an inextricable part of their brand. Rebecca Minkoff and Amazon Go are succeeding in revolutionizing the face of retail as we know it using innovative technology. All these companies summarize the points made in the literature and offer useful examples for strategies that resonate with Generation Z.

STORY. STORY is not your average concept store. Founded in 2011 by Rachel Shechtman and based in New York, STORY focuses on "experience per a square foot" (Diorio, 2016, p. 13). It sells merchandise like a traditional store, changes its products every 3-8 weeks like an art gallery and re-invents itself each time with a new theme (Diorio, 2016). Along with rotating themes, STORY uses the strategy of "retail media" where companies pay to take part by promoting items to customers as they shop (Harris, 2014, para. 5). This is an innovative concept that satisfies two needs: a collaborating company's products help immerse customers in the theme while generating revenue for the store. Major companies like General Electric, Home Depot, and American Express have already jumped at the chance to join (Harris, 2014). In 2018, a sponsorship could cost $600,000 and even up to $1 million during the holiday season (Sherman, 2018).

Experiences and experimentation are at the core of the STORY brand. Shechtman stated, "We really focus on experience per a square foot – looking at how each moment and part of the store experience can be engaging and provide surprise and delight!" (Diorio, 2016, p. 13). In practice, the store does exactly that; fuses new technology and exciting brands with engaging experiences. The "Making Things" theme, sponsored by General Electric, offered cutting-edge merchandise such as 3-D printed jewelry and a build-it-yourself robot while customers could interact with GE 3-D printers and laser cutters. Creating an ever-changing sensory experience where customers are free to touch, explore, and participate physically while learning new things gives people a reason to come back regularly. The concept store also works with Yankee Candle Scent Systems to create different scents for each theme (Diorio, 2016). A Frosted Spruce scent wafted throughout the store for its "Home for the Holidays" theme to evoke memories of the season (Diorio, 2016, p. 13). Pleasant scents are like the icing on the cake to providing a completely immersive experience. An often-overlooked aspect of the retail environment, scents actually evoke more favorable product perceptions in shoppers, making them more likely to buy (Diorio, 2016). The best brands are tapping into a range of senses to create a personalized experience like no other. Which aligns with the preferences of Generation Z.

Consumers and corporations alike have positively responded to STORY's creative retail strategies and commitment to experiences. According to Shechtman, the store was profitable in its first year and profits reached the six-figure range in 2014 (Harris, 2014). In 2016, Shechtman revealed the concept store's net income has doubled every year since its launch (Sherman, 2018). She attributes the innovative customer experience to the fact that all elements of the business from marketing to merchandising to business development work together as one to provide a holistic customer experience strategy (Diorio, 2016).

In 2018, Macy’s acquired the experientailer. Shechtman was made Brand Experience Officer and a year later a pop-up concept dedicated to STORY was piloted within several locations (Keyes, 2019). The concept store was in good shape when it was acquired, but Shechtman decided to sell in order to achieve a level of scale and expertise related to this that STORY wouldn’t have been able to achieve on its own (Sherman, 2018). By using experiential retail to help drive sales, generate more consistent foot traffic and differentiate itself from competition, STORY has the potential to expand to all Macy’s department stores (Biron, 2019). And it appears to be working. In May 2019, the department store reported an increase in performance, with same-store sales driven up by 0.7% for the first quarter of the year, possibly in part due the “narrative driven retail experience” (Biron, 2019, para. 3).

The successful concept store brilliantly fuses innovative technology with exciting merchandise and sensory involvement. At the same time, this retailer educates consumers on its themes with new products and events in an entertaining environment, making this brand a clear leader in the industry and well positioned for the future with Generation Z.

Galeries Lafayette Haussmann. With a goal to bridge the gap between fashion and art, another experientailer blazing the way for the future of brick-and-mortar retail is the French department store Galeries Lafayette Haussmann (R. Benmaafa & K. Semenova, personal communication, September 2, 2018). With well over 600 brands represented, Galeries is an iconic monument of Parisian shopping with about a hundred thousand visitors from all over the world each year (Galeries Lafayette Haussmann, 2018). Experiences are what really make this 100-year old fashion retailer unique. Galerie des Galeries, an art gallery on the second floor, presents "emerging talents of both today and tomorrow" from designers, artists, and architects (Galerie des Galeries, n.d., para. 1). These artists are a constant source of inspiration for the store and its customers. The department store offers varied experiences including a French macaroon bakery class from a distinguished pastry chef, French wine tasting and rooftop events and concerts to name a few (Galeries Lafayette Haussmann, 2018; "Activities & Events," n.d.). Carefully planned and presented, Galeries is a place that empowers and promotes French culture, food and fashion with authentic experiences in the heart of Paris.

As impressive as the list of experiences may be, the *pièce de résistance* is the Go for Good campaign that Galeries introduced in 2018 to encourage and persuade consumers to buy sustainably and evolve for the better ("Go for Good for a more responsible fashion). More than a limited initiative, it aims to bring a selection of fair products from brands that promote responsible manufacturing and consumption methods. The campaign offers the opportunity to network, participate in events, and benefit from services with both style and purpose ("Go for Good for a more responsible fashion," n.d.; "Go for Good le mouvement est lancé," 2018). The way in which Galeries promoted the campaign was in the form of a concept store called Le Good Spot. This rotating merchandise area sells sustainable lifestyle and beauty products as well as men's, women's, and children's fashion.

Galeries even called on Stella McCartney to orchestrate an exhibition, “Sanctuary of Stillness,” recognizing the designer as a leader in sustainable fashion and founder of a brand that proves desirability and ethics are not mutually exclusive (“Stella McCartney's Sanctuary of Stillness,” n.d.). From September 6 to October 10, 2018, the store’s visitors were presented with a theme of meditation and the environment, constructed using only eco-friendly materials, processes and techniques. The Go for Good campaign proved Galeries has aligned sustainability with the core of its brand rather than as a superficial marketing strategy. This authentic expression has surely resonated with Generation Z shoppers as Galeries has made a real effort to bring attention to the issue of sustainability and offer its customers ways to participate in saving our planet.

Personal communication with Kateryna Semenova, High End Customer Advisor of Galeries, confirmed that experiential retailing is centered around meeting customer’s needs. Perhaps the department store has seen a slowdown in foot traffic similar to many U.S. department stores and malls as of late? Semenova confidently shook her head and said, “French people still want to come, see, and feel clothing” (Semenova, September 2, 2018). In addition to these important interactions, consumers come to Galeries for the variety of brands and sustainable fashion, but, most of all, for the renowned quality and authentic experiences (Benmaafa & Semenova, September 2, 2018).

Everything Galeries does adds value to the shopping experience and that comes from knowing the customer. The department store invests in sustainability, an issue its customers value, stays true to the core of the brand by supporting French culture in meaningful ways and provides an immersive and expansive shopping experience that keeps one coming back. All of these are secrets of success when it comes to Gen Z.

Rebecca Minkoff. Minkoff is redefining expectations for what is possible for the future of brick and mortar. The brand partnered with eBay to create a highly digital experience powered by AI (Milnes, 2015). This technology collects information on consumer behavior, specifically, which items are taken into the fitting room and subsequently purchased or left behind via interactive screens. The flagship store in the Soho area of New York City is the first of the brand's "connected stores." The first interactive screen customers encounter is on the main floor—which doubles as a mirror when not activated. They need only tap the screen to access all the latest content from Minkoff, including runway shows, photos, and news from its social media channels, hence the term "connected store." While browsing through the latest Minkoff garments on-screen, a customer can add items to be sent to a fitting room. Once the fitting room is ready with the appropriate items the customer receives a text.

Inside the smart dressing room, the Minkoff customer has the ability to adjust the lightning using the interactive mirror to go from an unflattering florescent to "Hudson River Sunset" or "Soho After Dark" (Milnes, 2015). This feature was the product of extensive research by eBay to provide the best shopping experience (Bohannon, 2014). The company found that lighting in dressing rooms and convenience were some of the most important factors to Minkoff customers. RFID tags recognize which products have been selected, and in real time, the customer can peruse styling options or request a different size or color without ever leaving the fitting room. Once ready to leave, she can send those items to check out, confirm purchase and instantly receive a digital receipt.

With this eBay collaboration, Minkoff remakes traditional aspects of the in-store experience and engages a new generation of customers. The interactive screens, which give the shopper access to the latest collections and personalized product recommendations, bring the online world to the store without the use of a smartphone (Milnes, 2015). Being able to request different sizes and styles while in the fitting room saves time and facilitates purchases by eliminating the hassle of redressing, searching for the product, and coming back to the room to undress again. Overall, the Minkoff store perfectly integrates the online world and provides ease, convenience, and an interactive experience for customers.

More than mere communication devices, the interactive screens are able to collect information on consumer behavior, like which items are taken into the fitting room and what is being purchased or left behind (Milnes, 2015). This data is extremely important because it lets brand personnel know what fashion products customers are responding to and not. This affords the opportunity for Minkoff to change the direction of its collections based on those styles that have appealed to customers. For example, based on what customers were pairing with certain items in the fitting rooms, the brand added more date night and weekend wear to its predominantly business casual collection. A surefire way to add value for the customer.

According to Uri Minkoff, the CEO and co-founder, the innovative fitting rooms have both increased customers' time spent in stores and made triple the amount of projected clothing sales even though the brand is primarily known for its handbags (Milnes, 2015). Additionally, engagement with the screens has been higher than expected. Minkoff expressed that 30% of customers who go to the fitting room request more items via the interactive screens because of the product suggestions feature. This opened the brand up to additional sales in its lesser performing apparel categories by suggesting items customers might have not considered.

Minkoff's connected store has also paid off for its partner. David Geisinger, eBay's head of retail and mobile innovation, understands customers are demanding more engaging experiences, so his organization focuses on organizing stores around customers rather than product (Milnes, 2015). Minkoff's customers have responded enthusiastically to the technology and even feel more confident in the fitting room. An article by CNBC supports this success, confirming that sales at the flagship "have been up more than 200 percent each year since installation" (Schlesigner, 2017, para. 14).

The partnership takes the best parts of the online world and perfectly fuses them with the physical store via innovative technology. Every detail of the flagship's retail format is designed to offer convenience and products that the Minkoff shopper, especially those of Gen Z, wants. Extensive measures were taken to learn the customer, and the data collected from shopper engagement is used to create a more tailored product assortment. Ultimately, these efforts add even more value for the customer.

Amazon Go. Go represents the future of retail technology. The cashier-less checkout is the epitome of convenience and ease. Simply scan the Go app to enter, pick up grocery staples from the shelves, and just walk out. Sensors detect when items are removed but will not charge your account for items you decide against and place back on the shelf. Once ready to leave the store, Amazon charges the items and sends an itemized receipt (Mikel, 2016). Using "a combination of computer vision, sensor fusion and deep learning," Amazon seems to have spelled the end for cashiers, long checkout lines and waiting in general (Mikel, 2016, para. 5).

Moreover, according to a survey by Shorr Packaging, 84% of respondents said that they would prefer Amazon Go's cashier-free shopping experience over that of a traditional grocery store ("Most Prefer Amazon Go," 2018). One in four respondents stated that they'd be willing to pay *more* for groceries if it meant avoiding a checkout line. Clearly, the cashier-less shopping experience is appealing to consumers and driven by a desire for convenience. The concept of the store built around speed currently offers on-the-go-type meals and snacks as well as a small selection of groceries and essentials (Redman, 2019).

By 2021, Amazon has plans to open 3,000 Go stores offering a limited selection of groceries or prepared food pickup (Day, 2018). As of yet, Amazon has not announced any plans to sell their proprietary cashier-less technology. However, according to PitchBook Data Inc., "Venture capital firms backed U.S. companies working on store automation with $111 million in 2018," a surge seen after the first cashier-less Amazon Go store opened (Day & Soper, 2019, para. 15). Competitors have been forced to respond with numerous retailers producing their own versions of expedited checkout, including, but not limited to Macy's, Target, Walmart, and even the French grocery chain Casino. Go stores are already outpacing typical convenience stores with average sales per square foot of $853 compared to an estimated $570 per square foot for the latter (Redman, 2019). The end result being a plethora of retailers offering some form of "just walk out" technology, which in turn would create an inconvenience to have to wait to pay at stores that are behind the curve. In fact, Juniper Research estimates that it will only take until 2021 to have over 2,000 retailers adopting smart checkout technologies, including cashier-less and robotic checkout (Martin, 2018).

As exciting as it is to experience the future of retail in its beginning stage, there are some obstacles that may prevent immediate and large-scale adoption of the Go concept. First, it currently costs $2-3 million to make cashier-less operations run and that cost only goes up when developing the technology for a bigger store (Day, 2018). Second, lack of product selection at Amazon Go was a high on the list of drawbacks for a large percentage of respondents to the Shorr Packaging survey ("Most Prefer Amazon Go," 2018). Cost may be a substantial barrier to progress, but if expansion continues, it could only take until 2021 for average annual sales to reach $4 billion, which creates a more practical budget for costs (Redman, 2019). However, a poor selection of products can cause consumers to shop the competition or online leading to irrelevancy of the physical store. These are important issues for fashion retailers to consider and address as they seek to meet the needs of its customers.

Amazon may decide to grow the concept by licensing the cashier-less technology to other retailers or competitors, who will continue to innovate expedited checkout services. One thing is certain—Amazon Go along with industry leaders like STORY, Galeries Lafayette Haussmann and Rebecca Minkoff are succeeding in remaking physical retail as we know it and offering the best practices for Generation Z.

Summary

Each of the three areas in this literature review—Generation Z, customer experience and leading retail formats—provided the foundation to address the research questions in this study. Based on the statistics, articles and reports researched for the first section, the Generation Z cohort values engaging experiences, personalization, convenience, product availability, authenticity and transparency. They want retailers and brands to value their opinions and create a seamless transition from the online to in-store shopping experience. All of this information is critical to determine how brick-and-mortar fashion retail will change in the future.

The second part provided facts and strategies for tailoring the experience to each shopper's needs. Innovations such as AI and digital signage have enhanced the customer experience and increased profits for the retailer as well. Fusing the best aspects of the digital experience in the physical store has proven to be a winning strategy and is what Generation Z consumers want.

The last section ties everything together by highlighting four exceptional retailers who are redefining what is possible for retail. They are industry leaders who maximize customer experience and use innovative technology as inextricable parts of their brands. Devising creative retail strategies that focus on experience or making genuine efforts to promote sustainability is what Generation Z consumers value. Utilizing AI and cashier-less technology yields greater convenience, a more interactive experience and integrates aspects of the online world. These efforts perfectly meet expectations and needs of this important consumer group. Furthermore, these advancements collect information on consumer behavior that can help inform a retailer's products and collections for the future.

This research will examine and add knowledge to the literature about what Generation Z consumers really want and how brick-and-mortar fashion retailers can provide this to prosper long-term. The future of how we shop is based on the needs and preferences of this generation, so it essential to learn as much as possible and synthesize this information in a meaningful way. One could say the entire fate of retail's existence is based on how well brands can adapt, innovate and lead the industry into this next chapter.

Methodology

Investigating what the near future holds for brick-and-mortar fashion retailers is an ambitious but necessary undertaking to suggest concrete strategies for transforming traditional shopping. To address the research questions, a survey was designed with the purpose of gauging what Gen Z shoppers value most in the customer experience, the advantages and drawbacks of brick-and-mortar retail shopping today, and what they wish to see change in the future. The specific focus sample for this study was Generation Z students enrolled in college-level fashion courses. These future industry professionals are educated consumers who have begun to develop significant and general characteristics and shopping behaviors for researchers to analyze. These individuals were selected to participate in this survey based on their curriculum, which affords them a comprehensive understanding of the retail and fashion industry. Their input can provide a valuable addition to the literature for developing future initiatives.

After approval from the Institutional Review Board, a pilot test was conducted. Once satisfied with the instrument, six of the top fashion schools in the country that have a program for fashion merchandising or business or require an internship or co-op in the fashion industry were selected by the researchers. Individual faculty members teaching at these universities were identified based on the researchers' network. These initial faculty members provided suggestions of colleagues using a snowballing technique. Meaning one faculty member might have referred another, who we also used for the study, and so on. A Qualtrics system link to the quantitative survey, "The Future of Brick-and-Mortar Fashion Retail" was sent via email to select professors of fashion courses to forward to their students across the six university programs. Survey data was collected and analyzed using descriptive statistics. The culmination of this research provides information about how this consumer group behaves and their attitudes toward different retail experiences and in-store technologies now and in the future.

The following research questions addressed each element of the problem and guided this study:

1. What aspects of brick-and-mortar shopping do consumers, specifically the Generation Z cohort, value most when evaluating their customer experience?
2. What aspects of the current customer experience determine success for retailers?
3. What best practices should brick-and-mortar fashion retailers adopt or build upon, in terms of technology, products, services and physical characteristics, to adapt and meet Generation Z consumer needs long-term?

With the pilot test completed, identification of the sample population for this research commenced.

Sample

The United States offers college students a wide range of large and small programs focusing on fashion. To gain a sense of the scope of fashion education, a Google search of "degree in fashion" had about 473,000,000 results. The criteria for selecting students in the Generation Z cohort for participation in this research are as follows:

- Fashion merchandising or design student currently enrolled at university who has completed at least two courses in fashion merchandising or business OR has completed an internship or co-op in the fashion industry
- At least sophomore year in credit level so sample was comprised of students who have an above average understanding of the retail industry
- Must be enrolled in a B.S. or B.A. program at a four-year university because these institutions offer a greater depth and breadth of the program and faculty
- 18-24 years old of any race, ethnicity or gender

Universities and programs with potential students for inclusion were first identified through a process of review and analysis of prominent college rating websites for fashion merchandising/business or design programs with a bachelor's degree program. The initial pool was selected based on the 2018 fashion school ranking lists from websites Fashionista, Fashion Schools and College Choice. These websites offer the most recent and comprehensive lists of the top undergraduate fashion schools in the U.S. and the world. Fashionista.com surveys thousands of students and alumni to develop their annual international Fashion School Rankings (Fashionista, 2018a). Fashion Schools ranks the top 50 schools and colleges based on factors like admissions data, graduation success, reputation and a survey of school and industry professionals (FS Staff, 2018). College Choice analyzes quality, cost, reputation and student satisfaction along with data from independent and governmental sources ("Best Fashion Degrees," 2018). As seen in Table 1.1, rankings vary by year based on a number of factors, yet the following universities consistently appear on these lists. Choices were narrowed based on the universities appearing in the top 25 schools across at least two lists with majors in fashion merchandising/business or design or those that require an internship or co-op in the fashion industry. Non-U.S. based universities were not considered.

The sample was further narrowed based on an evaluation of each school's fashion major curricula, specifically the number of retail industry and business-related courses each university offered or the requirements for the internship/co-op program. If a fashion curriculum provided more business-related courses or the work experience program was more than a summer/semester, that university had a higher chance of being selected for participation in the survey. This is because the study was meant to concentrate on students with an educational focus on the business side of fashion retail and real-world experience in this aspect of the industry. From there, faculty and courses at each school were chosen based on contacts within the researchers' scholarly professional association network. Six universities with fashion programs in five U.S. states were identified as meeting the criteria as seen in Table 1.1.

Table 1.1

2018 Fashion Program Rankings

University	Fashionista (out of 25)[a]	Fashion Schools (out of 50)[b]	College Choice (out of 25)
Drexel University	14	20	20
Iowa State University	-	10	5
Kent State University	15	4	-
University of Delaware	-	22	1
University of North Texas	-	17	14
University of Cincinnati	-	18	16

[a] Fashionista 2019: Drexel (6), Kent State (13) and Cincinnati (25).

[b] Fashion Schools 2019: Drexel (15), Iowa State (10), Delaware (37), North Texas (18) and Cincinnati (21).

Drexel University. Drexel offers an undergraduate degree in Design and Merchandising with a concentration in Retail Buying and Merchandising ("Design & Merchandising: Degree Requirement," n.d.). In this program, students study retail merchandising and marketing channels and can take courses like Fashion Product Development, Retail Operations and Consumer Behavior. Drexel also offers a renowned co-op program where students can take six months out of school for a paid job opportunity (Fashionista, 2018c). Students have the opportunity to study abroad at the London College of Fashion or Sungkyunkwan University in Seoul and have gone on to study at the Chambre Syndicale, the prestigious school of French couture.

Iowa State University. Curricular quality and competitive edge define the fashion program at Iowa State University (FS Staff, 2018). The Apparel, Merchandising and Design major offers students an understanding of apparel, merchandising and marketing strategies, product development and business practices ("Apparel, Merchandising, and Design," n.d.). Students must choose a primary option, from design, product development/sourcing and merchandising, and then a secondary option if they chose product development/sourcing or merchandising. If a student chooses an option in merchandising the courses offered range from Consumer Studies in Apparel and Fashion Products to Fashion Product Development and Prototyping (secondary option) to Aesthetics of Consumer Experience (secondary option). Study away opportunities include major fashion hubs such as New York or Chicago or participation in one of the many international study programs in Europe.

Kent State University. Kent State has long been a renowned school for fashion; 90% of students secure jobs upon graduation for both design and merchandising ("About Fashion," n.d.). In the Fashion Merchandising major, students acquire an extensive knowledge of retail operations, fashion forecasting and the development and marketing of fashion products ("Fashion Merchandising – B.S.," n.d.). Courses such as Fashion Retail Industry, Fashion Marketing and Seminar in Fashion Merchandising (writing intensive) are required in the curriculum. Unlike many other fashion schools, an internship and study abroad experience are also mandatory to complete the program. Moreover, Kent boasts campuses in New York and Florence as well as study abroad programs in Paris, Hong Kong, South Korea and London (Fashionista, 2018b).

University of Delaware. This university also offers a degree program in Fashion Merchandising in which students gain an understanding of complex apparel industry channels and focus on social responsibility and creating solutions for current industry challenges ("Bachelor of Science in Fashion Merchandising and Management," n.d.). Students are required to take courses such as Seminar on Fashion Sustainability, Advanced Apparel Product Development and International Fashion Consumers and Retailers ("Degree Requirements, n.d.). The University of Delaware has a cooperative agreement with the esteemed Fashion Institute of Technology (FIT, ranked number one and number four on the Fashion Schools' and Fashionista's rankings lists respectively) where fashion students can study for one year and receive credit for their program (FS Staff, 2018). While there, they have access to FIT's resources and faculty as well as fashion houses located in NYC.

University of North Texas. This university only offers programs in Fashion Design and Design Management. However, the College of Visual Arts and Design and College of Merchandising, Hospitality and Tourism work closely to provide a program where students receive a wholistic understanding of the industry, including knowledge of retail commerce ("Fashion Design and Merchandising," n.d.). Within the Fashion Design major, fashion students must take Fashion: Target Market and Fashion: Industry

Techniques ("College of Visual Arts and Design: B.F.A. Fashion Design," 2019). Within the Design Management major, options include Introduction to Retail Merchandising and Consumer Studies ("College of Visual Arts and Design: B.A. Interdisciplinary Art & Design Studies: Design Management," 2019). Study abroad offerings include an Asia program that offers trips to Hong Kong, Macau and mainland China to learn more about the apparel supply chain and the manufacturing industry in China (Fashion Design and Merchandising, n.d.).

University of Cincinnati. Last but certainly not least, the University of Cincinnati offers one of the most intensive and comprehensive fashion curricula in the country with a five-year degree program in Fashion Design ("Fashion Design: B.S. in Design," n.d.). In their third year, students at can choose a focus in Fashion Design or Product Strategy, where they learn the business and creative process of how to bring fashion goods to the marketplace (FS Staff, 2018). The Fashion Design curriculum also boasts a required co-op program in which students receive real-world experience working full-time in the fashion industry over the course of five semesters ("Fashion Design: B.S. in Design," n.d.).

The researchers reviewed grade level, prerequisites and descriptions of select courses identified as fashion merchandising, industry, or business oriented. In all programs with the exception of Kent State University, an initial professional courtesy email was sent to instructors regarding openness to receive direct communication from the student researcher with request for honors data collection. Initial messages were received positively. If a faculty member was unable to participate because of leave or courses that did not meet criteria (ie: fashion design courses with no business aspect), the general result was a successful connection with colleagues through snowball sampling. A list of the selected courses from each school are below. The full list of universities, course numbers, course names and other information about recruitment for participation can be found in Appendix B.

Drexel University	Retail Intersections: Social and Cultural Issues, Visual Merchandising, Retail Operations
Iowa State University	Sourcing and Global Issues
University of Delaware	Fashion and Apparel Studies Research and Discovery, Development of Contemporary Fashion: Cultural Expressions, Development of Fashion: 1600 to World War I, Fashion and Textile Collection Management
University of North Texas	Merchandising Career Development, Product Development, Global Sourcing, Trend Forecasting, Visual Merchandising and Promotion, Internship
University of Cincinnati	Fashion History

However, the process for selecting courses at Kent State differed slightly; criteria included the coursework and the student researcher's own experience in the Fashion Merchandising program including study away. Because one of the aspects of this exploration is the idea that fashion students are more informed Generation Z consumers, and the requirement that at least two courses taken be in the area of fashion retail or business, all of the Kent courses selected are at least sophomore-level classes. For the main campus, the required major courses Fashion Retail Industry, Fashion Apparel Analysis, Product Development and Fashion Marketing, were chosen because they offer the most comprehensive analysis of the retail and fashion industry, apparel production and marketing of all the courses in the program. At the Kent State Florence, Italy campus, Product Development was selected in addition to Italian Fashion and Culture because this required course gives students a thorough overview of the Italian fashion industry enhanced with field experience to fashion galleries and museums for real-world application. At Kent State's NYC Studio, the course chosen was again Product Development to receive responses from the widest scope of experiences and perceptions from Kent Fashion Merchandising students.

Participants

This research relied on a purposive sample, selecting individuals who are considered a representative sample because they meet the criteria for the research (Bui, 2014). In this case, the purposive group was students enrolled in courses at targeted top-rated U.S. fashion programs. These representatives of the Generation Z cohort were specifically chosen for this study because of their curricular focus on the retail and fashion industry. The curriculum of each school combines the fundamentals of business, retail industry, various fashion and textile courses and real-world experience. These university students, especially merchandising majors, learn and can explain retail strategies and structures and are familiar with the process of product development. Very importantly, a requirement for many careers, especially internships and entry-level positions, in the fashion industry is having experience working in retail, so a majority of these students have experience working in the business. This informs their knowledge of the industry from the inside and increases rationale to choose from this population in attempting to answer the study problem. Moreover, these emerging professionals are immersed in apparel as a significant part of their education and undoubtedly put more consideration into their clothing purchase decisions whether consciously or not. Finally, they were also chosen as a way to differentiate the research and enhance the field of study by directly asking Gen Z consumers with subject-area expertise about their experiences and preferences regarding brick-and-mortar retail.

Measurement Instrument

"The Future of Brick-and-Mortar Fashion Retail" is a quantitative survey developed to support findings in the literature, address the research questions and collect new data directly from the Generation Z cohort (Appendix B). Questions were curated to measure Gen Zers in-store and online shopping behavior, focusing on the technology, shopping experience, personalization and brand relationships that are valued most by this customer along with aspects of retail they wish to see changed in the future. Several questions were based on the NRF and IBM reports and the literature (Cheung, et al., 2017a; 2017b).

The survey was comprised of 26 questions including multiple choice (both single and multiple answer), matrix table and rank order. For some questions, if a certain answer was selected, a follow up question was asked, which would not appear if the appropriate response was not chosen. For all questions that asked to select among choices about characteristics of the shopping experience, participants were given the option to type in a response. Question blocks were separated and presented in the following order: demographic information and retail experience, shopping avidity, attitude toward retail technology, experience, personalization, shopping behavior in terms of store and product selection, brand relationships, online and in-store activity and changes to the current in-store shopping experience.

For demographic information and retail experience, questions were formed based on the criteria and topics for the study, including grade level, gender, age, university, number of fashion retail industry or merchandising courses taken or if respondents had completed an internship/co-op. The survey automatically ended and was not considered for those whose responses did not match the eligibility checks. To gauge level of industry knowledge, as this would influence how participants shop and make them more mindful about where they shop, a question about experience working in retail was asked. The option to select experience at a fashion retailer specifically was included in this question set.

The shopping avidity block asked questions about fashion shopping frequency ("more than once a week" to "once a year or less") and avidity (avid to indifferent) as well as whether they prefer to buy products in-store ("strongly agree" to "strongly disagree"). Students who shop more frequently were expected to know more about the advancements in retail and have a greater understanding of what they like and do not like in the shopping experience. Preference for in-store shopping was specifically included to test the validity of statements in the literature by Salfino (2018) about this topic and Generation Z.

The next block surveyed respondents' attitudes toward retail technologies, specifically those powered by AI, engaging experiences and retail formats tailored to meet individual needs. These questions were arranged in a matrix table and response options ranged from "strongly agree" to "strongly disagree" on a 7-point Likert-type scale. For added background and support, these inquiries included specific examples. Brief descriptions of the unique customer experience at STORY and technological innovations by Rebecca Minkoff and Amazon Go were provided to ensure all respondents were equally informed prior to the question. The technology section also incorporated a multiple selection question of specific technologies that have been found to appeal to consumers and those they want to see more of in the future, like smart dressing rooms, interactive displays and cashier-less checkout (Milnes, 2015; "Most Prefer Amazon Go," 2018). The literature has shown advancements in technology, unique shopping experiences and personalization have high customer appeal, so this block was utilized to support how much respondents valued these aspects ("Most Prefer Amazon Go," 2018; Sherman, 2018; Guillot, 2018). These items were incorporated to help answer the last research question about what technologies Gen Z would like to see in the future from fashion retailers.

The questions in the shopping behavior section were based on the questions asked in the report *What Do Gen Z Shoppers Really Want?* to support the data or generate new information. This report provided insight into the generation's attitudes toward technology and consumer expectations (Cheung, et al., 2018). Participants were asked what makes them decide where to shop and, once a store is chosen, what the most important aspects are when shopping (questions borrowed directly from the report). For both questions response options included "convenience," "personalized service," "discounts," "rewards program," "ease of switching between channels," "unique experiences," "product availability," "value for money," "emotional connection with brand," "quality" and a type-in response (see Figure 1.1). Responses for both questions were ranked. The last question asked if participants are satisfied with the degree to which they are receiving those options, with the choice to select which options they were dissatisfied with. This block was meant to compare and contrast what respondents valued most before and during the shopping experience as well as aspects of current retail formats that have resonated with them and not. For example, question 13 (see Appendix B) was a ranking question asking about the participant's decision-making process in deciding where to purchase a product and the most important to least important factors involved. After the prompt, "Thinking about what makes me decide where to purchase a product, the following are the most important factors to me," subjects were given the options of "convenience (speed of service, locating product, checkout)," "personalized service," "discounts," "rewards program," "ease of switching between channels (online and in-store)," "unique experiences," "product availability," "value for money," "emotional connection with brand," "quality" and "other."

As explained in the literature, brand relationships are crucial to developing an emotional connection with the customer. This set of questions was based on the *Gen Z Brand Relationships* report and used to substantiate its findings. The report details how this cohort interacts with brands and their expectations (Cheung, et al., 2017a). Arranged in a matrix table, the items asked whether participants have a strong connection to certain brands and if it is important that a brand respect their opinions and expectations, engage them and be in sync with their values. Answer options ranged from "strongly agree" to "strongly disagree." Again, these questions provide useful information as to what customers value most in the shopping experience. Two follow-up questions were asked about if these factors influenced their decision to buy from a brand, which directly answers the second research question.

Online and in-store shopping activity questions were formed to support the findings in the literature that the Gen Z cohort expects a seamless transition from online to in-store shopping experiences. The first several questions, which asked whether shoppers get information about a product online and whether they buy that product online or in store, were given response options of "all the time" to "never." For example, question 17, presented a matrix table relating to respondents' online and in-store shopping activity, specifically where they search for product information and where they purchase that product (see Appendix B). After the prompt, "Respond appropriately to how accurately each question describes your online and in-store activity," subjects were presented with, "I browse online to get information about a product," "I browse online to get information about a product and buy that product online," "I browse online to get information about a product, but buy that product in-store," and "I use my phone while I'm shopping in-store."

Other questions included if participants use their phone in store and how as well as the expectation for the same products to be available in store as online using a Likert-type scale ("strongly agree" to "strongly disagree") and multiple selection. An example of multiple selection was question 17a with the prompt, "I use my phone to do the following while shopping in-store. Select all that apply." Participants were first given the options of "look up product information," "comparison shop," "shop online for items not in-store," "look up discounts/coupons," "use social media," "text," "check email" and other," followed by an opportunity to indicate the frequency of utilization (see Appendix B).

The last set of inquiries in this section gained insight as to what respondents thought were the best aspects of online shopping, such as "a wide selection of merchandise choices," "quick transaction processing," "personalized recommendations," and if they would like to see those aspects integrated into the physical store. This set of questions gauge Generation Z device usage, expectations and their attitudes and hopes for the future of integrating the online and physical platforms.

Finally, the last question of the survey asked participants what they would like to see changed from the current in-store shopping experience. Responses included "more convenient experience," "more engaging experience," "more personalized," "more like the digital shopping experience," "wider variety of product choices," "greater product availability," "greater value for money," "better quality," "more discounts" and "rewards program." This directly relates to the third research question because the answers are aspects of the customer experience that retailers need to build upon to adapt and meet Gen Z needs and expectations.

This survey was distributed using the Qualtrics system, which records responses to each question and sorts the data in using graphs, percentages and statistical measurements. The instrument was approved by the Institutional Review Board, protocol #19-180. See Appendix B for the IRB approval, informed consent statement and complete survey.

Validity. The measurement instrument has strong validity as revealed by a pilot test of nine people administered before the main data collection. The pilot was intended to test the survey questions for the intended audience and bring to light any problems with the system or instrument. Based on an analysis of responses, all questions were deemed valid for feedback, but three more demographic questions were added, one more for shopping behavior and one more for online and in-store activity to provide more detailed data. In addition, response choices about characteristics of the shopping experience were changed slightly to better answer research questions, stay in tune with the literature and be more understandable.

Reliability. The survey also has strong reliability because results were similar for both the pilot and main study. Results of this pilot were similar to expected outcomes. All pilot respondents had experience working in the retail industry, with all except one having worked at a fashion retailer. In terms of shopping avidity, the majority of pilot subjects answered they are average shoppers who prefer to browse in-store, which supports the statement by Van Buskirk, with the weakest response being "somewhat agree."

When asked about their attitudes toward various advancements in retail technology, the majority of pilot participants were most excited to see more interactive fitting rooms like those at Rebecca Minkoff in the future. Interestingly, when asked if they would return to a store if it had engaging experiences the participants agreed, but when asked if they would patronize a retailer like STORY that focused on fun and creative customer experiences, the response decreased to "somewhat agree." Respondents did expect their retail experience to be personalized to their needs and preferences and would be more loyal to a brand that did this.

Pilot data from the shopping behavior block showed that when thinking about where to purchase, the top-rated answers were "ease of switching between channels," "unique experiences," "product availability," and "personalized service." For the next set of questions about brand relationships, expectedly, most respondents agreed they have a strong connection to a particular brand and feel it's important for brands to engage with them digitally and in-store. However, the majority took a neutral stance on whether they'd stop patronizing a brand if it didn't engage with them.

For the online and in-store activity block, more than half of pilot subjects said they get product information online "all the time," but an even split of respondents say they buy that same product either online or in store. In addition, a majority said they only "somewhat agree" that they expect the same products that are online to be offered in store. And when selecting the best features of online shopping, respondents picked "product reviews," "wide product selection," and "ease of locating products" as their top choices. Participants strongly agreed that they would like to see these aspects integrated into the in-store experience. All of these questions give insight into Gen Z consumers' expectations for the digital experience in the physical store.

For the final question, the biggest factors pilot participants would like to change about the in-store experience were "more discounts," "wider variety of product choices," "better quality," "greater value for money," "greater product availability" and "a more engaging experience." It is interesting that above all else it came down to reduced price as the factor that the Gen Z respondents wanted to see more of, more so than engaging experiences, personalization or convenience.

Procedure

Once the necessary changes were made after the pilot test, the researchers sent introductory emails to selected professors at the six universities asking if they would be willing to participate in the survey (recruitment script in Appendix B). In the inquiry, the purpose of the study was explained, why students should participate, and extra credit was encouraged to be given to increase participation, but not required. After all instructors agreed, a follow-up message gathering information about their selected courses (course number, name and enrollment) and informing them of the timeline of the survey was sent (full course and contact list in Appendix B). The survey was administered from Monday, September 23, 2019 to Friday, September 27, 2019. A link to the survey was distributed to professors that Monday to send to their students (Appendix B). Then on Wednesday or Thursday of that week a follow-up was sent to instructors to encourage their students to complete the survey. After that Friday, the survey closed to the public and analysis began.

Data Analysis

After the survey closed on September 27th, results were immediately available for analysis on the Qualtrics system. It reported results for each question in several ways, including a bar graph, a table detailing the percentage of participants who responded to each answer and a table showing the minimum, maximum, mean, standard deviation, variance and count. Responses were compiled together as a group and analyzed using descriptive statistics. Analysis was based on how well the data supported the literature, matched the pilot test and offered insights into what Generation Z shoppers want in order to answer the research questions.

The literature and pilot test indicated there could be a subsegment within the sample, so data was also isolated and analyzed for respondents aged 19-21. A filter was added to only show responses from these participants and this data was compared to all other responses using the same methods. This was done to see if this age group revealed slightly different attitudes and behaviors, since they have the highest smartphone usage and online shopping frequency out of their generation and are more likely to have a strong connection with a brand according to the reports detailed in the literature (Cheung, et al., 2017b; Cheung, et al., 2017a).

The results of this study added invaluable information about Generation Z behaviors, attitudes and expectations for the fashion retail industry. In addition, it offered insight into what specifically educated consumers in the cohort want retailers to change. This information is essential to answering the research questions and piecing together the puzzle of what the future of brick-and-mortar shopping should be.

Results

Quantitative data was collected from Generation Z consumers studying fashion regarding their shopping behavior and decision-making processes, attitudes and expectations about the shopping experience and what they wish to see from retailers in the future. Each survey item was designed to inform and answer at least one of the three research questions.

Response data is expressed as a percentage of the total. Results include the mean and standard deviation (*SD*), *N* refers to the number of respondents to a particular answer choice and Total *N* refers to the total number of respondents to a question. The mean value was determined by codifying each answer choice, with the first choice being 1, the second 2 and so on. Meaning a mean of 1.5 would signify the average response lies right in-between the first and second answer choice. For questions with a Likert-type scale, strongly agree = 1, agree = 2, somewhat agree = 3 and so on. For ranking questions, respondents were asked to rank answer options with 1 being the most important.

The survey was distributed to a potential sample of 1254 students enrolled in various fashion courses across six universities: Kent State University, including Kent State Florence and the NYC Studio, Drexel University, University of Delaware, Iowa State University, University of Cincinnati and University of North Texas (see Appendix B for the full course and contact list). Data collection was conducted online using Qualtrics with a response rate of approximately one-third (418 respondents) of the potential sample. After removing those who did not fit criteria in terms of age, data from 332 participants was analyzed. The results of the data collection are presented in this chapter.

General and Demographic Questions

The survey link was provided to course instructors who then shared the link and recruitment script to students in their classes on a Monday morning. A follow-up was sent the following Wednesday or Thursday morning and the survey closed on Friday night. This provided potential participants five days to complete the measurement instrument. In some instances, instructors offered extra credit for participation. Before the survey could begin, all participants agreed to a standard informed consent which detailed the topic of the survey, investigators and that participation was voluntary. Of a potential 1254 students invited to participate, 418 respondents selected yes to the informed consent.

Demographic data and eligibility. Six demographic and eligibility questions were created to assess if each respondent met the criteria for inclusion in this study. Respondents were required to answer three eligibility questions. If they did not meet one of the requirements, the survey automatically ended, and their partial responses were recorded. Demographic data collected for the initial items included gender, age and class standing.

The first question asked the gender of participants. To be considerate, an option of “prefer not to say” was included. Of the 380 participants, the overwhelming majority were female at 93.95% with a small percentage who declined to choose, which can be seen in Table 2.1 below.

Table 2.1

Gender of Participants in Survey

Gender	%	*N*	Total *N*
Male	5.26	20	380
Female	93.95	357	
Prefer Not to Say	0.79	3	

The second item defined the age of participants. The majority of participants were 20 and 21 at 27.82% and 28.78% respectively. 15.83% were 19, 11.75% were 22 and the remainder aged 18, 23 and 24. The percentage of individuals 25 and up did not fall within the age range for Generation Z and were thus removed from analysis, resulting in a mean age between 20 and 21 years old (Table 2.2).

Table 2.2

Age of Participants

Age	%	*N*	Mean	*SD*	Total *N*
18	4.56	19	3.72	1.57	417
19	15.83	66			
20	27.82	116			
21	28.78	120			
22	11.75	49			
23	4.08	17			
24	3.12	13			
25+	4.08	17			

The next question identified class standing. As previously mentioned, the majority of respondents were ages 20 and 21 meaning they were mostly juniors and seniors, which is evidenced in Table 2.3. Juniors and seniors made up 35.43% and 41.71% of participants respectively, while freshmen and sophomores made up 3.25% and 19.35% respectively. The survey automatically ended for those who selected freshman as they would not have sufficient underlying coursework and, therefore, did not meet the requirements for this study.

Table 2.3

Class Standing of Participants

Class Standing	%	*N*	Mean	*SD*	Total *N*
Freshman	3.52	14	3.15	0.85	398
Sophomore	19.35	77			
Junior	35.43	141			
Senior	41.71	166			

The purpose of this study focused on Generation Z consumers who have in-depth knowledge of fashion retail as part of their education. This important aspect of eligibility for participation was addressed in the question regarding whether participants had completed at least two courses in fashion merchandising or business or had completed an internship or co-op in the fashion industry (Table 2.4). Of the 380 (Total *N*), those who remained after the previous eligibility questions, 87.63% had and 12.37% had not. As a result of this check question, the total number of respondents decreased from a high of 418, who accepted the informed consent, to 331, since some students did not fit the criteria. This number of participants fluctuated through the rest of the survey for various reasons, but results will focus on responses from this group going forward.

Table 2.4

Completion of Retail Industry/Fashion Courses or Internship/Co-op

Response	%	*N*	Mean	*SD*	Total *N*
Yes	87.63	333	1.12	0.33	380
No, neither	12.37	47			

Question five gauged which university each respondent attended (see Figure 1.1). The total number of participants who responded to this question was 332. Of this number, a little over half were from Kent State University main campus (51.20%). Slightly more than a fourth of respondents hailed from the University of North Texas (27.11%). All other universities and campuses had less than 10% of the total number of participants as seen in Figure 1.1.

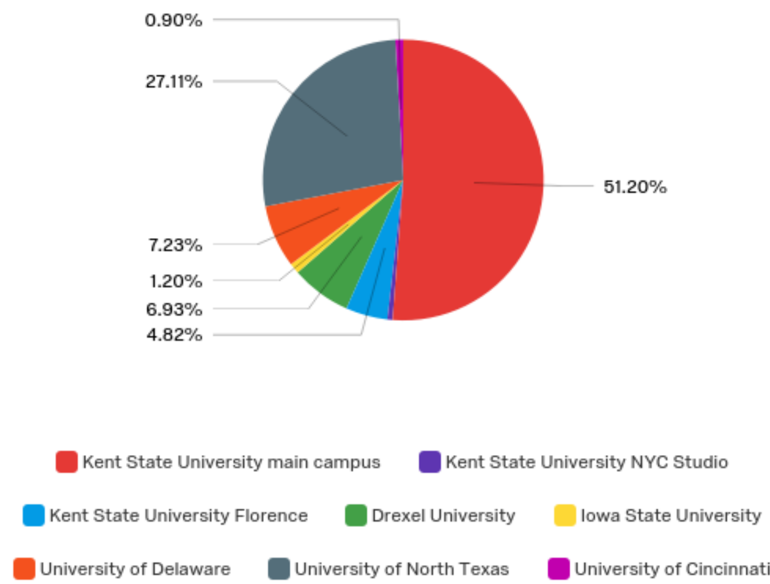

Figure 1. University distribution. Pie chart of the distribution of respondents' home universities for question five.

Retail Experience and Shopping Avidity

The first question in this block asked students if they had had experience working in retail (Table 2.5). Almost three-quarters had experience at a fashion retailer and nearly 10% at a non-fashion retailer. A significant percentage (17.47%) did not have any experience. The mean leaned more toward "yes, at a fashion retailer" at 1.37, and standard deviation was rather small at 0.66, which indicates responses did not vary much from the mean.

Table 2.5

Experience Working in Retail

Experience	%	*N*	Mean	*SD*	Total *N*
Yes, at a fashion retailer	72.59	241	1.37	0.66	332
Yes, at a non-fashion retailer	9.94	33			
No	17.47	58			

Then participants considered how often they shop at fashion retailers for themselves (Table 2.6). “Once a month” was the most popular response at 42.90%, then “once a week” at nearly a third of the 331 who answered this question. The extreme of “once a year or less” received the lowest percentage at 0.60%. The mean hovered in between “once a week” and “once a month” at 2.57.

Table 2.6

Shopping Frequency at Fashion Retailers for Oneself

Frequency	%	*N*	Mean	*SD*	Total *N*
More than once a week	12.08	40	2.57	0.87	331
Once a week	32.33	107			
Once a month	42.90	142			
Once every couple months	12.08	40			
Once a year or less	0.60	2			

Question eight surveyed students' shopping avidity as shown in Table 2.7. In keeping with the previous question, more than half responded they were average shoppers, with a significant percentage characterizing themselves as avid shoppers (37.46%), and only 7.25% who believed themselves indifferent to shopping. The mean skewed more toward average shopper at 1.70 with a standard deviation indicating a low variance from the mean (0.60).

Table 2.7

Types of Shoppers

Types	%	*N*	Mean	*SD*	Total *N*
Avid shopper	37.46	124	1.70	0.60	331
Average shopper	55.29	183			
Indifferent shopper	7.25	24			

The last question in this block used a 7-point Likert-type scale (1 being “strongly agree” and 7 being “strongly disagree”) to assess a respondent’s preference for buying products traditionally (Table 2.8). The majority fell toward the agree side of the scale: 29.00% chose “agree,” 28.70% chose “somewhat agree” and 27.19% chose “strongly agree.” Only a small percentage identified more with the disagree side of the spectrum. The mean shows us that responses fell in-between “agree” and “somewhat agree” at 2.41 with a rather high standard deviation of 1.24, which tells us responses were quite spread out over the scale.

Table 2.8

Preference for Buying Products In Store

Likert Scale	%	*N*	Mean	*SD*	Total *N*
Strongly agree	27.19	90	2.41	1.24	331
Agree	29.00	96			
Somewhat Agree	28.70	95			
Neither Agree nor Disagree	8.76	29			
Somewhat Disagree	3.93	13			
Disagree	1.81	6			
Strongly Disagree	0.60	2			

Generation Z Consumer Values

The remaining survey questions have been sorted into sections according to which research question they best answer. The questions believed to best address the first research question are numbers 11-15, 16 (statements one, three and five) and 16b, which are detailed below. Please see Appendix A for tables related to certain questions in this section. The first research question is as follows: What aspects of brick-and-mortar shopping do consumers, specifically the Generation Z cohort, value most when evaluating their customer experience?

A 7-point Likert-type scale (1 being “strongly agree” and 7 being “strongly disagree”) was used for question 11 to investigate respondents’ attitude toward the retail shopping experience (Table 3.1 in Appendix A). The format for this question was a matrix table, which allows one to answer multiple items in one question. An average of 320 students responded to three statements: if they felt the experience of buying a product was just as important as the product itself, if they would be more likely to return to a store that had engaging experiences, and if they would be more likely to patronize a store like STORY rather than a traditional retailer. The first statement saw very favorable responses with 36.45% who chose “strongly agree,” 35.51% who chose “agree” and 20.56% who chose “somewhat agree.” Very few selected opposing options: 3.74% chose “somewhat agree,” 0.93% chose “disagree” and 0.62% chose “strongly disagree.” A small 2.18% remained neutral. The mean fell on the “agree” option and standard deviation was rather large indicating a relatively wide range of answers varying from the mean (1.14).

The next statement saw a significant jump to 51.41% who “strongly agree” that they would return to a store with engaging experiences. Less than 3% selected opposing options. The mean (1.75) fell more toward the “agree” option and the standard deviation was lower than that of the previous statement (1.01).

Results of the final statement were very similar to the first. There was approximately a single percentage point difference between the results on the agree side of the scale for the final statement and those on the agree side for the first statement in this block. On the other hand, this statement also had the most significant disagreement ("somewhat agree"- 2.50%, "disagree"- 2.19%, "strongly disagree"- 0.63%) and neutral stance (7.19 %) of the table. The mean and standard deviation were also the highest of the table (2.17 and 1.24 respectively), which indicates increased variance in participants' responses for this item.

Respondents' attitudes toward retail personalization were gauged with the next question with the same matrix table style and 7-point Likert-type scale (Table 3.2 in Appendix A). The first statement asked if they expect a shopping experience that is tailored to their needs and preferences, and the second asked if they would be more loyal to a brand that did this. The first statement garnered 320 responses total. Results of the agree side are as follows: "strongly agree" - 23.44%, "agree" - 32.81%, "somewhat agree" - 30.00%. Results of the disagree side of the scale amounted to less than 6% of the total. The mean was in between "agree" and "somewhat "agree" skewing moderately more toward "agree" at 2.43. The standard deviation tells us that results were quite spread out from the mean at 1.20.

Total count for the second statement decreased by one response. The percentage for the "strongly agree" and "agree" options increased to 37.30%. The number of responses on the disagree side and neutral stance dropped significantly ("somewhat disagree"- 1.25%, "disagree"- 0.63%, "strongly disagree"- 0.31%, "neither agree nor disagree"- 5.33%). The average response was "agree" (1.99) and standard deviation 1.03.

Question 13 asked participants to rank the factors that are important to them when deciding where to shop from 1, being the most important factor, to 11, being the least important (Table 3.3 in Appendix A). A total of 307 students responded to this question, and of these, 30.94% felt "convenience (speed of service, locating product, checkout)" was the most important factor. The second highest percentage for the number one ranking was "value for money" at 16.61%. The highest rated factors that were ranked at number two was "value for money" (17.92%) and "discounts" and "quality" both of which were chosen by 15.64% of respondents. In the third place slot the most popular responses were "quality" (16.94%) and "discounts" (15.31%).

For all ranking questions in the survey with a type-in response, the majority of respondents left it blank and ranked it in last place. Because of this, these responses will be temporarily removed from results analysis of the last place and the highest mean for all ranking questions. To that effect, what respondents predominantly selected for question 13 in last place was "ease of switching between channels (online and in store)" (1.30%), "rewards program," "personalized service" and "emotional connection with brand" all of which received 0.98% of the total.

"Convenience" had the lowest mean at 3.74 meaning it had the highest average ranking among the group. Other than the type-in response, the factor with the lowest average ranking was "ease of switching between channels (online and in store)" with a mean of 7.15. It is worth noting that five type-in responses added "sustainability" to the ranking, which is the highest number of type-in responses with the same answer in the survey.

Differing slightly from the previous question, question 14 asked what the most important factors are to respondents *while* shopping (Table 3.4 in Appendix A). Again, with 1 being the most important factor to 11 being the least important. A total of 293 students responded and the same answer choices were used as the previous question. "Convenience" (30.03%) stayed consistent as the most popular selection for the number one ranking, but "quality" (18.43%) overtook "value for money" as the second most popular selection for this ranking. "Quality" (15.36%) was also frequently selected for the number two slot as well as value for money (15.36%) and product availability (16.38%). Ranked at number three, "discounts" was the highest selected factor at 18.77% then "convenience" at 14.33%. Besides the type-in response, the least important factors were "quality" and "emotional connection with brand" which both received 1.37% of responses. The factor with the lowest mean was again "convenience" (3.60) but the highest mean switched to "emotional connection with brand" (7.32). In addition, some type-in responses included the factor "sustainability."

Using the same factors as the previous two questions, the next question asked students with which aspects of shopping they are most unsatisfied (Table 2.9). "Unique experiences" topped the list as the most frequently chosen aspect at 16.74%, followed by "personalized service" at 12.12% and "product availability" at 10.68%. Interestingly, the option "not applicable. I am satisfied" was added as an option which garnered 10.97% of responses.

Table 2.9

Certain Aspects of Shopping with Which Respondents are NOT Satisfied

Aspects	%	*N*
Not applicable. I am satisfied	10.97	76
Convenience (speed of service, locating product, checkout)	6.35	44
Personalized service	12.12	84
Discounts	5.48	38
Rewards Program	5.34	37
Ease of switching between channels (online and in store)	6.20	43
Unique experiences	16.74	116
Product availability	10.68	74
Value for money	7.94	55
Emotional connection with brand	6.20	43
Quality	11.11	77
Other (type in)	0.87	6

Note. *Respondents could choose multiple answers. The Qualtrics System did not include measures of central tendency or total count for this type of question. Type-in responses included the variety of sustainability, fit, fabric offered and customer service.*

A matrix table and 7-point Likert-type scale were used for question 16 to explore respondents' brand relationships (Table 3.5 in Appendix A). Total *N* fluctuated from 311 to 309 participants who responded to a total of six statements. The statements listed in this section are numbers one, three, five and six. The first statement said, "I have a strong connection to a particular brand(s)." The majority agreed with this statement: 31.19% chose "strongly agree," 36.33% chose "agree," 20.90% chose "somewhat agree." Less than 5% disagreed and none chose "strongly disagree." 6.75% stood neutral. The mean hovered toward the "agree" option at 2.18 with the lowest standard deviation of all statements in the table at 1.11.

The third statement was designed to evaluate whether it was important for respondents to be engaged by a brand online and in store. This statement saw a significant drop in the selection of the "strongly agree" option to 16.50%. More opted for "somewhat agree" (26.54%) and "agree" (33.33%). The disagree side of the scale and neutral position also increased: 6.15% chose "somewhat disagree," 5.50% chose "disagree," 0.65% chose "strongly disagree," and 11.33% chose "neither agree nor disagree." The mean and standard deviation were some of the highest in the table at 2.76 and 1.38 respectively.

The fifth statement rated whether it was important for respondents that a brand be sustainable and transparent in its business practices. Most responses were in agreement with 31.29% choosing both "strongly agree" and "agree." Only a few respondents chose options on the disagree side of the scale. Mean (2.25) leaned toward the "agree" option and standard deviation was 1.16.

Finally, the last item dealt with whether it was important for the respondent that a brand value their opinions, like comments on its social media or ideas for new products or fashion direction. The highest selected response was “agree” at 34.63%, and the “strongly agree” option dipped from the previous statement to 21.69%. A significant percentage selected “neither agree nor disagree” (12.94%). Mean was right in-between “agree” and “somewhat agree.”

The second follow-up to question 16 judged participants’ willingness to submit their ideas for new products or give their opinion on a new fashion direction for a brand (Table 2.10). This question was not given to those who did not choose an option in favor of or neutral to the sixth statement of question 16 regarding whether it is important that a brand value the respondent’s opinion. The same 7-point Likert-type scale was used. Of the 288 who answered, the most selected response was “agree” at 42.01% followed by “strongly agree” at 39.93%. Only five people chose the responses “somewhat disagree” or “disagree” and none chose “strongly disagree.” In this way, the mean (1.88) skewed toward “agree” and the standard deviation was rather low at 0.95, which indicates responses were relatively close to the mean.

Table 2.10

Willingness to Give Opinion on New Product Ideas or Fashion Direction for a Brand

Likert Scale	%	*N*	Mean	*SD*	Total *N*
Strongly agree	39.93	115	1.88	0.95	288
Agree	42.01	121			
Somewhat Agree	11.11	32			
Neither Agree nor Disagree	5.21	15			
Somewhat Disagree	1.04	3			
Disagree	0.69	2			
Strongly Disagree	0	0			

Determinants of Success Within the Customer Experience

The second research question is best answered by the survey questions seen in this section: 12 (statement two), 16 (statements two and four), 16a, 18a. The results for question 12 were detailed in the previous section. This research question is: what aspects of the current customer experience determine success for retailers?

A matrix table and 7-point Likert-type scale (1 being “strongly agree” and 7 being “strongly disagree”) were used for question 16 to explore respondents’ brand relationships (Table 3.5 in Appendix A). Total *N* fluctuated from 311 to 309 participants who responded to a total of six statements. The statements listed in this section are numbers two and four. The second statement said if a brand did not live up to expectations or broke trust, the respondent would stop patronizing the brand. Respondents mostly agreed: 34.19% chose “agree,” followed by “strongly agree” at 27.42% and “somewhat agree” at 23.87%. This statement did not have anyone who strongly disagreed.

Of all the statements in the table, the fourth one had responses the most spread out across the scale. It assessed whether respondents would stop patronizing a brand if it did not engage with them or value their opinions. The highest percentage was for “somewhat agree” at 29.71%. More respondents remained neutral (18.77%) than chose “strongly agree” (12.30%). The mean and standard deviation were the highest of the table at 3.11 and 1.39 respectively meaning a significant portion of respondents chose options on the disagree side of the scale.

The first follow-up to question 16 asked if sustainability was an important factor in the decision to buy from a brand (Table 2.11). This question was not made available to those who did not choose an option in favor of or neutral to the fifth statement of question 16 regarding if it is important that a brand be sustainable. The 7-point Likert-type scale was used, and 298 people responded. Of this number, the most popular response was “somewhat agree” at 35.57%. Many chose “strongly agree” (21.14%) and “agree” (28.86%) and only a few selected options on the disagree side of the scale. None chose “strongly disagree.” The average response lay right in-between “agree” and “somewhat agree.”

Table 2.11

Impact of Sustainability on the Decision to Patronize a Brand

Likert Scale	%	*N*	Mean	*SD*	Total *N*
Strongly agree	21.14	63	2.49	1.10	298
Agree	28.86	86			
Somewhat Agree	35.57	106			
Neither Agree nor Disagree	9.40	28			
Somewhat Disagree	4.36	13			
Disagree	0.67	2			
Strongly Disagree	0	0			

For the follow-up to question 18, students were asked if they would patronize a brand less or stop altogether if the same products and services were not offered both online and in store (Table 2.12). This question was not made available to those who did not choose an option in favor or neutral to question 18 regarding their expectations for products offered online and in store. The 7-point Likert-type scale was used, and responses were quite mixed among the 280 respondents. Curiously, "neither agree nor disagree" was the most selected response at 26.07% followed by "somewhat agree" at 22.50%. A large segment of students chose "somewhat disagree" (14.29%). The average response lay in between "somewhat agree" and "neither agree nor disagree" but closer to the latter, which makes this the question with the highest mean in the entire survey.

Table 2.12

Decrease in Patronage of a Brand if Similar Products and Services Were Not Offered Online and In Store

Likert Scale	%	*N*	Mean	*SD*	Total *N*
Strongly agree	6.07	17	3.64	1.47	280
Agree	18.57	52			
Somewhat Agree	22.50	63			
Neither Agree nor Disagree	26.07	73			
Somewhat Disagree	14.29	40			
Disagree	10.00	28			
Strongly Disagree	2.50	7			

Practices to Meet Generation Z Needs

The remaining questions 10, 10a, 17, 17a, 18 and 19-21 are noted in this section and best answer the third research question: What best practices should brick-and-mortar fashion retailers adopt or build upon, in terms of technology, products, services and physical characteristics, to adapt and meet Generation Z consumer needs long-term?

Question 10 used a matrix table and 7-point Likert-type scale (1 being “strongly agree” and 7 being “strongly disagree”) scale to evaluate respondents’ attitude toward retail technology (see Table 3.6 in Appendix A). 325 students responded to a total of three statements about their level of excitement pertaining to: innovative technology in fashion retailers powered by AI, Amazon’s “just walk out” technology, and the interactive fitting rooms in Rebecca Minkoff’s flagship store.

Excitement toward technology powered by AI, such as cashier-less checkout technology and smart dressing rooms, received positive responses: 37.23% chose “strongly agree,” 31.69% chose “agree,” 17.85% chose “somewhat agree.” Only a small percentage disagreed: 4.00% chose “somewhat disagree,” 1.85% chose “disagree,” 1.54% chose “strongly disagree.” 5.85% remained neutral. The mean leaned more toward the “agree” stance at 2.19, but the standard deviation (1.34) indicated responses were quite spread apart from the mean.

Excitement for future retail technologies similar to “just walk out” was similar to that for the previous statement in the table. The majority of respondents were in favor. However, slightly more respondents than the previous statement chose options on the disagree side of the scale; the highest being 4.92% who “somewhat disagree.” In addition, more respondents than the previous had neutral feelings (10.46%). The standard deviation (1.33) was almost exactly the same as the previous question, but the mean (2.47) shifted to right in-between “agree” and “somewhat agree.”

Future fitting rooms like those of Rebecca Minkoff had the most positive responses in the table with a little over half of respondents strongly agreeing they would like to see more fitting rooms like this in the future. This question also received the lowest neutral response (3.38%) and lowest standard deviation (1.06). The mean skewed more toward the “agree” option at 1.78.

Question 10a ranked which specific retail technologies the Gen Z respondents wanted to see more of from fashion retailers in the future (see Table 3.7 in Appendix A). This was a follow-up which was not made available to those who did not choose an option in favor or neutral to the first statement of question 10 regarding AI. Of the 291 students who responded to this inquiry, almost half chose “smart dressing rooms” as their first choice (46.05%) and “personalized product recommendations” ranked the second highest for the number 1 slot (23.37%). The technologies with the highest percentages ranked at number two were “interactive digital displays” (32.99%) and “smart dressing rooms” (24.40%). “Interactive digital displays” (29.21%) and “personalized product recommendations” (19.93%) came in as the most popular for the third place slot. Finally, in last place, other than the type-in response, the most selected was “robots” (9.62%) and “cashier-less checkout” (0.69). It is worth noting that “smart dressing rooms” and “interactive digital displays” were not selected at all for this last slot. The option with the lowest mean was “smart dressing rooms” at 2.03 meaning it had the highest average ranking. The option with the highest mean, other than the type-in response, was “robots” meaning it had the lowest average ranking.

Question 17 was the last matrix table style in the survey and asked participants questions about their online and in-store shopping activity (see Table 3.8 in Appendix A). A 5-point Likert-type scale was used with 1 being “all the time” and 5 being “never.” Around 311 participants answered four statements about how often they browse online to get information about a product, browse online for a product and buy that product online, browse online and buy in-store and use their phone while shopping in store.

For the first statement, about half of respondents selected “all the time” and about a third selected “usually.” “Sometimes” received 12.86%, “seldom” 2.57% and “never” 1.29%. The mean (1.72) leaned toward “usually” and standard deviation was relatively low at 0.88.

“Sometimes” was the most selected response for the second and third statement at 36.66% and 35.92% respectively. However, the mean for these two statements show a slight difference. The second garnered a mean of 2.37, closer to an average response of “usually,” while the third had a slightly higher mean of 2.46, an average response more so in the middle of “usually” and “sometimes.” This means more participants browsed for a product online and bought that item online than those who browsed online and bought in store.

Finally, the last statement had very close percentages for the first three responses within the scale. “All the time” and “sometimes” received the same percentage of 26.69% and 25.08% chose “usually.” However, a significant percentage chose “seldom” (14.47%) and “never” (7.07%) as well. The average response (2.50) was right in-between "usually" and "sometimes," and the standard deviation (1.22) indicated answers were quite spread out from this mean.

The follow-up to question 17 inquired about what participants do on their phones while shopping in store. This question was not given to those who did not choose an option in favor of or neutral to the fourth statement of question 17 about whether respondents use their phone while shopping in store. The highest-rated answers were "text," "look up discounts/coupons" and "look up product information." A type-in response was included and two respondents added "read product reviews."

Table 2.13

What Participants Do on Their Phones While Shopping In Store

Phone Usages	%	*N*
Look up product information	16.25	162
Comparison shop	12.64	126
Shop online for items not in store	9.23	92
Look up discounts/coupons	17.35	173
Use social media	15.65	156
Text	18.96	189
Check email	9.33	93
Other	0.60	6

Note. Respondents could choose multiple answers. The Qualtrics System did not include measures of central tendency or total count for this type of question. Type in responses included *read product reviews (2 responses), organize schedule for the day, locate product in store, take pictures.*

Expectations were judged in question 18 about whether products and services offered online should be offered in store as well. Answer choices were given in the format of the 7-point Likert-type scale. Out of a total of 309 respondents, most selected an option on the agree side of the scale. About 30% chose “strongly agree” and “agree” and about 23% chose “somewhat agree.” The mean skewed closer to the “agree” option and the standard deviation (1.30) indicated results were relatively spread out from the mean.

Table 2.14

Expectation for Products and Services Offered Online to be Offered In Store

Likert Scale	%	*N*	Mean	*SD*	Total *N*
Strongly agree	30.74	95	2.35	1.30	309
Agree	30.42	94			
Somewhat Agree	22.98	71			
Neither Agree nor Disagree	7.44	23			
Somewhat Disagree	5.83	18			
Disagree	2.27	7			
Strongly Disagree	0.32	1			

Respondents were then asked to choose what they felt were the best aspects of online shopping in question 19. They chose “a wide selection of merchandise choices,” “product reviews” and “convenience” as their top choices. Besides the type-in response, the lowest rated choice was “personalized recommendations.”

Table 2.15

Best Aspects of Online Shopping

Aspects	%	*N*
A wide selection of merchandise choices	23.07	248
Product reviews	22.14	238
Quick transaction processing	12.56	135
Convenience	16.84	181
Personalized recommendations	8.84	95
Ease of locating products	15.91	171
Other	0.65	7

Note. Respondents could choose multiple answers. The Qualtrics System did not include measures of central tendency or total count for this type of question. Type in responses included more discounts, unique products, quickly comparing products between brands, seeing the clothing on a model, no human contact, by online pick up in store.

Question 20 assessed students’ eagerness to see the best aspects of online shopping, which they answered in the last question, integrated into the in-store experience. This question used the 7-point Likert-type scale and a total of 307 students responded. Responses were overwhelmingly in favor. 42.02% chose "agree" and 36.81% chose "strongly agree." Only five people selected responses on the disagree side of the scale and none chose "strongly disagree." The average response was "agree" and the standard deviation indicates results were relatively close to the mean.

Table 2.16

Eagerness to See Aspects of Online Shopping Integrated with the Physical Store

Likert Scale	%	*N*	Mean	*SD*	Total *N*
Strongly agree	36.81	113	1.94	0.97	307
Agree	42.02	129			
Somewhat Agree	14.66	45			
Neither Agree nor Disagree	4.89	15			
Somewhat Disagree	0.33	1			
Disagree	1.30	4			
Strongly Disagree	0	0			

The very last question of the survey directly asked students what they would change about the in-store shopping experience. Only a small percentage of 1.23% felt that nothing should be changed. Percentages were relatively close for most of the options, but the most popular responses were "greater product availability," "more discounts" and a "more convenient experience."

Table 2.17

Changes to In-store Shopping Experience

Aspects	%	*N*
Not applicable. I do not want to change anything	1.23	15
More convenient experience	11.26	137
More engaging experience	9.29	113
More personalized	9.37	114
More like the digital shopping experience	6.00	73
Wider variety of product choices	11.09	135
Greater product availability	14.54	177
Greater value for money	10.35	126
Better quality	10.02	122
More discounts	11.83	144
Rewards program	4.93	60
Other	0.08	1

Note. Respondents could choose multiple answers. The Qualtrics System did not include measures of central tendency or total count for this type of question. Type in responses included the ability to easily look up product reviews while in store.

Summary

Overall, the results largely supported the literature and added to the understanding that Generation Z is not a homogeneous group when it comes to shopping behavior and preferences. The greatest values found for the Generation Z consumer were convenience, quality, value for money and discounts. Engaging and unique shopping experiences excite them, and sustainability is a very important factor for the majority. Value equates to profits, so brands that take these values into account will succeed with this consumer group. Findings also support the integration of the physical and online platforms. They crave the best aspects of the online experience, namely greater product availability, greater convenience and a wide variety of product choices, to be incorporated into the physical store.

Discussion

This research was conducted to understand the "how": how is retail changing and how can retailers adapt for the future? Learning the customer is essential to adapting to retail's advancements. Retailers that ignore the influential Generation Z cohort place themselves at considerable financial risk.

The fashion industry is driven by consumer demand; therefore, the shopping experience should be centered around the customer. However, few studies have directly asked the Generation Z consumer about their shopping preferences, expectations and values and none have asked future fashion industry professionals what they want from fashion retailers. As a result, a survey was conducted to address this gap and develop recommendations for how retail will need to transform in the near future. Data was gathered directly from this population across six of the top fashion schools in the country. Results supported knowledge that Generation Z is not a homogeneous group when it comes to shopping behavior, expectations and preferences.

General and Demographic Questions

The fashion programs at the selected schools are majority female, so an overwhelmingly female participation in the survey was expected. The mean grade level of participants was between the junior and senior level because the survey was strategically sent to professors of upper-level courses. Finally, the researchers had the most contacts at the Kent State Fashion School, so it makes sense the majority of participants would come from this school.

Retail Experience and Shopping Avidity

Most of the students surveyed have experience working in retail. This was a major consideration in choosing the population for this survey because it informs their knowledge of the retail industry from the inside and may contribute to their decision making in terms of apparel purchases. In addition, nearly half of participants shop once a month and more than half characterized themselves as average shoppers. These middle-of-the-road results were expected considering the tight budgets on which many college students live. Furthermore, this shopping frequency may have increased the likelihood of their knowledge of retail industry advancements and made them more aware of their likes and dislikes in the shopping experience.

The standard deviation tells us responses were rather spread across the scale, so participants were mixed when it came to preference for buying products in store. A little over half definitively supported the statement; a finding which slightly diverges from the literature which indicates a greater majority (72%) of Generation Z who prefer to shop in store (Salfino, 2018). While the majority did fall toward the agree side of the spectrum, those who did not likely preferred online shopping (especially for its convenience and other factors which traditional shopping cannot replicate) or felt both platforms had their individual merits and drawbacks. However, when respondents aged 19-21 were compared with the other Gen Z respondents, a small percentage more of this age group prefer to shop in-store. This could be related to the fact that since this generation has a preference for apparel shopping, there are certain tangible factors that make the in-store experience more appealing (Cheung, et al., 2017b).

Generation Z Consumer Values

Analysis of data from survey questions are detailed below to answer the first research question.

Responses indicate that Generation Z greatly values engaging and unique shopping experiences. The second statement, which asked students if they would be more likely to return to a store if it had these experiences, received a very positive response from just over half of respondents. However, the next statement did not receive as strong a response when describing STORY's unique retail experience. The reason behind this discrepancy could be that most students weren't aware of STORY or its specific format did not suit some tastes, but the general consensus was that engaging experiences are important.

For the next question, results indicated that this cohort did not have a unanimous expectation for a personalized shopping experience. Even though the data skewed toward the agree side of the scale, standard deviation was rather high for the first statement. Yet the statistic in the literature which stated about a quarter of Generation Z consumers expect a more personalized shopping experience was comparable to the percentage of those who chose the "strongly agree" option (23%) in the survey (Guillot, 2018). The second statement also revealed that almost three-quarters of respondents would be more loyal to a brand that tailors its shopping experience, which provides insight into another value for this consumer group.

Overall, “convenience,” “quality,” “value for money” and “discounts” were valued most. Sustainability was also a major component for many even though this was not included in the answer options. “Convenience” was listed as the number one factor when deciding where to shop and when shopping. This is one of the main reasons to online shop, so perhaps respondents have an expectation for convenience to be provided across platforms. An explanation for why “quality” and “value for money” were seen as some of the most important factors is this generation’s value of sustainability. A shift in consumer mentality can be seen with those from this population who make a point to buy clothes that last and don’t contribute to the wasteful consumerism for which the fashion industry is known (Craggs, 2019).

In keeping with these findings, those aged 19-21 were more interested in “quality” and ranked it higher among the choices than “discounts,” the choice which the rest of respondents ranked higher. Five respondents, all aged 19-21, added sustainability to the ranking with their type-in option. Notably, five students also chose their type-in response as their number one choice. Based on this information, the 19-21 age group may be more environmentally conscious when it comes to their purchase decisions than others in the generation.

When selecting what they were not satisfied with from the shopping experience for the following question, participants wanted more “unique experiences,” “personalized service” and “quality.” These values are supported by the results.

Gen Z students surveyed have a strong connection to certain brands that they believe to be trustworthy and authentic. The results stress the importance of a company taking their opinions and values into consideration; a view which is supported by *Gen Z Brand Relationships* (Cheung, et al., 2017a). Moreover, more of those aged 19-21 were strongly in favor of the statement about whether it is important a brand be sustainable than other respondents. As detailed in the literature, this age group is more likely to have a strong connection to a brand than any other age category of the Generation Z, especially if that brand were to create a connection based on a value like sustainability. A possible explanation for this finding could be that they have a stronger understanding of their individual preferences and consumer identity than others in the cohort.

Determinants of Success Within the Customer Experience

Answers to the second research question can be found by analyzing the results from the survey questions seen in this section.

Almost three-quarters of respondents stated they would be more loyal to a brand that tailors its shopping experience to their individual needs. The fundamental purpose of every company is to meet the needs of its customers (Hyun, 2020). When consumer needs are met value occurs; value equates to profits and loyalty translates to long-term profits for the brand.

Trustworthiness and authenticity are values that the survey showed can make or break a company financially. About three out of every five respondents definitively indicated they would stop patronizing a brand if it did not uphold these values. As stated in the literature, transparency builds trust among consumers who have grown up in the age of "fake news," so it is understandable they would value a company that did this and take their business elsewhere if trust was broken (Cheung, et al., 2017a).

Despite many type-in responses addressing sustainability in previous questions, there was not as much enthusiasm for options "strongly agree" or "agree" when asked whether being sustainable impacts their decision to buy from a brand. However, one must be cognizant that these are students who might not have the funds to buy completely sustainable. Notably, no one chose "strongly disagree," which may further indicate the value Generation Z consumers place on sustainability even if they cannot afford it all the time.

Items addressing brand patronage produced the most indecisive results of any question in the survey. The majority chose "neither agree nor disagree" when asked whether they would stop patronizing a brand if the same products and services were not offered across platforms. Perhaps this is because there are certain intrinsic qualities for both platforms that cannot be completely replicated in the other. While there is a general expectation for a seamless transition between platforms, according to the literature and results of this survey, these consumers might know this can't be fully realized today and, therefore, will not commit to turning their back on a store that does not have this (Cheung, et al., 2017b).

Practices to Meet Generation Z Needs

Analysis of results for the remaining items, to answer the third research question, are noted in this section.

Some of the most overwhelmingly positive responses of the survey suggest interactive technology, specifically in fitting rooms like those in the Rebecca Minkoff flagship store, is an advancement these consumers want to see from more retailers. Over half of all respondents chose “strongly agree.” Interestingly, the first statement did not get as strong of a response when it expressed excitement for smart dressing rooms. Perhaps the detail the third statement went into about the specific features of the interactive screens and smart dressing rooms is to account for the increased positive response. In addition, about 10 percent more respondents aged 19-21 than those of other ages strongly agreed with the first statement about being excited about AI and cashier-less tech and six percent more for the third item than those of other ages. This finding is substantiated by this age group’s proclivity for smartphone usage and online shopping (Cheung, et al., 2017b).

Consistent with the previous question, the sub question had “smart dressing rooms” as the most chosen response for the number one place and “interactive digital displays” for both second and third place. One can infer this to mean these consumers crave interactivity that adds value to their shopping experience in the coming age of retail. Sustainable technology was mentioned as one of the type-in responses, which was a theme throughout questions with a type-in option. Additionally, “personalized product recommendations" had the second highest percentage of responses for the number one slot of technologies participants would like to see more of in the future. This data is supported by the results of question 12 because participants indicated they would be more loyal to brand that tailored its offerings to their individual needs.

Results ultimately support developing efforts to integrate aspects of the online experience into the physical store for the future. Responses show half of all participants browse online to get information about a product, but slightly more buy that product online instead of in store. In fact, four of the five type-in responses for the sub question were related to finding out more information about a product or saving it for future reference. It might be more convenient when one is shopping online to look up product information, reviews and discounts and then buy that product online instead of going to a store to find that same product. A store that incorporates features to find useful information about a product (for example, Rebecca Minkoff flagship's interactive screens or the Neiman Marcus and Perch Interactive collaboration) and adds more convenience is a good starting point to integrate the platforms.

A rather mixed response was revealed by standard deviation, but the majority of students surveyed have an expectation that the same products and services be offered both online and in store. This directly supports the statements made in *Uniquely Gen Z* and *Understanding Gen Z* (Cheung, et al., 2017b; Van Buskirk, 2018). Of course, a physical store can only hold so much inventory, while an online store is practically limitless. However, this is a clear indicator that a greater effort should be put toward integration, such as creating a way online products can be seen and shipped from the physical store.

The top three best aspects of online shopping selected were “a wide selection of merchandise choices,” “product reviews” and “convenience.” By supporting efforts that integrate these aspects into the physical store, retailers can achieve the best of both worlds. This integration is something that would add value to the consumer experience and add the convenience Gen Z craves.

The tremendous response in favor of incorporating more of the online experience in-store leaves nothing to the imagination. These consumers want to see this change happen from retailers. Results can help retailers determine which efforts to begin with: “greater product availability,” “more discounts,” “more convenience experience” and “and a wider variety of product choices” topped the list. Three of these four choices are major characteristics of the online shopping experience, which further supports the idea of integration. The considerable response in favor of more discounts can be attributed to the tight budgets on which many college students live and supports the finding of Van Buskirk (2018) that Gen Z is more attracted to discounts than a long-term reward. The “not applicable” option was the least chosen option when not factoring in the type-in response, which suggests changes need to be made expeditiously.

Summary

Imagine you are out shopping at a clothing store. The store recently redeveloped their app for in-store shopping, and you are excited to try it for the first time. As you walk in, an associate greets you and tells you about the new features of the store. The updated app now offers advanced capabilities for in-store shopping: fitting room and styling recommendation features, stock availability checking and eliminates unnecessary waiting at checkout. Signage also provides simple steps on how to use the new capabilities of the app. Interactive screens cover the walls, which are available to browse the online store, order items that might not be in stock, look up product information and read reviews. As you peruse the racks, your eye goes to a “night-out” dress you saw online a couple days prior in your favorite color. You quickly scan the barcode of the item by hitting the “scan barcode” button within the app. After your item is added to the in-app shopping cart, you are presented with recommendations on garments and accessories to match with that scanned item. You are on the fence about a jacket they suggested but love the pair of strappy heels and go directly to the shoe department to get them. Triumphantly, you grab the last pair of heels in your size and scan its barcode. You select the “fitting room” option within the app and head there with your two items.

Another interactive screen lives inside the fitting room to adjust the lighting and request additional items be sent to your assigned room. You remember the jacket that was suggested and decide to try it on, so you enter your size and fitting room number via the screen and hit “request.” An alert is sent to the smart device of a designated associate on the floor to retrieve that particular item and bring it to the appropriate fitting room. You try on the dress and shoes, but hate the fluorescent lighting of the store, so you dim the lights to provide a more fitting atmosphere for the occasion. Instantly better.

A knock on your fitting room door lets you know the jacket has arrived. You scan the barcode of the item to add it to your cart. The jacket and the dress are an impeccably styled match, but the shoes come with a hefty price tag. You decide you can live without them, and simply remove them from your in-app cart. Upon realizing the dress may be a bit too snug to dance the night away, you check its availability in the next size up. Disappointed, you find out it is only available online, but then you remember, you can order it right then and there from one of the interactive screens on the floor! Excitedly, you give your unwanted item back to the fitting room attendant and rush over to one of the screens on the floor.

On the online store homepage, you see the brand is offering free shipping on all orders. At the bottom of the page, you also notice an annual sustainability report, which tracks the company's carbon footprint and details their efforts to maintain fair trade practices in developing countries where they do business. You finally find the dress you want and see that it is a part of the newest collection of fair-trade garments by the store. As a person who values the health of the planet and its people, you try to make sustainable decisions whenever possible and are proud to see this store contributing to this movement. You decide to purchase the dress in the appropriate size via the screen and use the promo code for free shipping. Then you go to your phone to pay for the jacket through the app with the card associated with your account. Instantly, you receive a digital receipt for both. RFID technology, which acts as a security sensor, is immediately deactivated in the jacket once payment is processed. Previously housed in bulky sensors, this technology is now sewn onto the inside of each garment next to the care label during the manufacturing process.

Finally, you drop off the hanger, grab a reusable bag for your item and exit the store without waiting in line to check out. You still have enough time to do some grocery shopping at the local Amazon store before meeting with friends for dinner. You cannot wait to come back to shop the next collection.

If you wanted to return an item, you would simply come back to the store and select the “return” button on the app. The cost is credited back to your account and the RFID is immediately reactivated once the item is returned to store. You can give the item back to an associate on the floor to bypass the return line. Online returns are also accepted in store.

This glimpse into the ideal store of the future engages, excites and generates loyalty. The redeveloped app and interactive screens keep customers focused on the shopping experience, while driving sales for the store. For example, styling recommendations increase the number of items sold per customer resulting in greater projected sales. These digital features also expedite checkout and increase shopping ease, especially in the fitting rooms. The store clearly incorporates Gen Z values, including convenience, value for money and discounts, into its retail format. The company was transparent in its sustainability efforts, but also the negative ways in which its supply chain practices impact the environment. The digital experience was expertly integrated into the physical store by engaging customers on devices they already use in store and to provide greater product availability and item information. In this way, the ideal store becomes a leader in technological innovation, which forces competition to match advancements, and, thus, creates a more digitally innovative retail market.

Limitations

Although the study gathered invaluable information about what practices should be integrated into the current shopping experience in order to meet the expectations and desires of the Generation Z consumer, there were several minor limitations. The first limitation related to the sample. The universities and courses chosen for the survey were selected with consideration but were limited based on the contacts available to the researchers with the exception of Kent State. As a result, the majority of the sample came from Kent State; therefore, there is an impact on external validity because of the purposive sample. However, it is not believed the majority of Kent State students skewed the results significantly because the curricula of all schools involved were similarly curated and chosen based on their comprehensiveness of major aspects of a fashion education.

Another limitation was related to participation. Participation may have increased in courses where extra credit was offered (see Appendix B for a full list of courses and which professors offered extra credit). This would have an impact on external validity because there may have been a slight difference in response rates between those students who received the link and participated because of interest and those who may have participated partially because of the incentive.

There were also several total count discrepancies between questions throughout the survey. For example, total count for question nine, a multiple-choice question with a 7-point Likert-type scale, was 331, which dropped significantly to 325 for question 10, a matrix table question with three statements using the same scale. These inconsistencies can be attributed to the fact that some participants may have left the survey early or skipped some questions because of their length. Specifically, the discrepancies among the total count for eligibility questions are due to the system removing respondents who did not meet the requirements for the survey in addition to seven people who chose to leave the survey early during this time. This affects the internal validity of the results because the same amount of people was not present for the entire survey.

Finally, the last limitation was related to the Qualtrics system. For multiple choice questions to which respondents could select multiple answers, the system did not include measures of central tendency or total count. This means only partial data was given for questions 15, 19 and 21, which may have limited understanding of the data for these questions when analyzed as a whole.

Recommendations for Future Research

Based on the results of the study, there are several recommendations for future research. The limitations outlined in this study are minor and did not significantly detract from the data collected, so the following recommendations focus on how this study can be continued and expanded. Further research could be conducted to delve more into financial data for how companies of varying sizes can integrate aspects of the online platform into their stores. The literature reveals how expensive it currently is to develop "just walk out" technology, so this might not be the right fit for every business. Research could reveal less-expensive alternatives to create a digital experience in store and offer more specific information for retailers. In addition, a study could focus specifically on Generation Z fashion students aged 19-21 to expand upon the data presented in this study. Longitudinal studies could be performed about how Generation Z tastes evolve in five years or how later Gen Zers have developed different preferences and expectations than that of earlier ones. This type of study could provide a comprehensive view of Gen Zers once they have increased their spending power and consumption. Finally, as future technologies emerge, this could be added to questions designed to gauge this consumer group's attitudes and excitement for the advancing retail landscape.

Conclusion

By directly asking educated Generation Z consumers questions about themselves and what they want and evaluating data from a specific age group within that cohort, key differences are presented among this consumer group. Most importantly, one can better understand how retail is changing. Retail can no longer be a static place where product exists on shelves and customers are expected to buy it. The newest generation wants to be engaged and connect to a brand that takes their values into account and listens to their voice. They especially want an experience that adds all the best aspects of online to the store. Now, retailers must engage this customer by providing unique experiences that encompass a variety of senses and are true to the brand to succeed in the future. Efforts must also be made to adapt to the technological advancements being made in the industry that add convenience and value as well as ones that incorporate the generation's frequent use of devices. Recommendations for specific practices stores should develop will vary based on their brand, target market and financial availability, but this research will help retailers immeasurably in their efforts as well as marketers, students and researchers.

Three major conclusions can be drawn from this study. First, Generation Z consumer values extend not just to the product they are buying but to the *experience* of buying that product as well. Aspects of brick-and-mortar shopping that matter most to these consumers include engaging and personalized experiences, convenience, quality, comparable value for money spent and discounts. Sustainability is also a big issue, especially for those aged 19-21, and for many, something of a prerequisite when it comes to deciding where and how to shop. These are all important details that can be applied to practices to meet needs long-term.

Valuing Gen Z values determines the future success of a fashion retailer. This is especially true when it comes to maintaining trustworthiness, authenticity and sustainability. When a retailer creates initiatives that resonate with the consumer based on their values and meets their needs, those initiatives have been demonstrated to translate to profits. This emotional connection created between brand and customer is a sound way to stimulate loyalty, which enables consistent profits.

Finally, combining these findings with efforts to integrate the online and in-store platforms is how retailers can adapt to meet needs long-term. Consumers indicated they wanted greater product availability, a more convenient experience and a wider variety of product choices from the physical store in the future. All of these factors are major characteristics of online shopping and can be provided through technological advancements like AI, thereby, meeting the needs and desires of Generation Z.

The future of retail is bright, but its fate rests in how well brands can adapt to the changing face of its customer.

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Appendix A

- Tables for survey questions 10-16

Table 3.1

Attitude Toward the Retail Shopping Experience

	I believe the experience of buying something is just as important as the product itself					I would be more likely to return to a store if it had engaging and unique experiences or events that fit the brand aesthetic				
Likert Scale	%	*N*	Mean	*SD*	Total *N*	%	*N*	Mean	*SD*	Total *N*
Strongly agree	36.45	117	2.07	1.14	321	51.41	164	1.75	1.01	319
Agree	35.51	114				32.92	105			
Somewhat Agree	20.56	66				9.40	30			
Neither Agree nor Disagree	2.18	7				3.45	11			
Somewhat Disagree	3.74	12				1.88	6			
Disagree	0.93	3				0.63	2			
Strongly Disagree	0.62	2				0.31	1			

Note. Table continues onto next page.

Table 3.1

Attitude Toward the Retail Shopping Experience

	STORY is a concept store in New York that sells merchandise like a traditional store, changes its products every 3-8 weeks like an art gallery, and re-invents itself each time with a new theme. I would be more likely to patronize a retailer that concentrated their efforts on personalized customer experiences that are fun and creative like STORY				
Likert Scale	%	*N*	Mean	*SD*	Total *N*
Strongly agree	35.31	113	2.17	1.24	320
Agree	34.06	109			
Somewhat Agree	18.13	58			
Neither Agree nor Disagree	7.19	23			
Somewhat Disagree	2.50	8			
Disagree	2.19	7			
Strongly Disagree	0.63	2			

Table 3.2

Attitude Toward Retail Personalization

	I expect a shopping experience that is tailored to my needs and shopping preferences					I would be more loyal to a brand that tailors its shopping experience to my individual needs				
Likert Scale	%	*N*	Mean	*SD*	Total *N*	%	*N*	Mean	*SD*	Total *N*
Strongly agree	23.44	75	2.43	1.20	320	37.30	119	1.99	1.03	319
Agree	32.81	105				37.30	119			
Somewhat Agree	30.00	96				17.87	57			
Neither Agree nor Disagree	7.81	25				5.33	17			
Somewhat Disagree	3.13	10				1.25	4			
Disagree	2.19	7				0.63	2			
Strongly Disagree	0.63	2				0.31	1			

Table 3.3

The Most Important Factors When Deciding Where to Shop

	Ranking													
	1		2		3		4		5		6		7	
Factors	%	*N*	%	*N*	%	*N*	%	*N*	%	*N*	%	*N*	%	*N*
Convenience (speed of service, locating product, checkout)	30.94	95	10.75	33	11.40	35	10.75	33	11.73	36	8.79	27	3.91	12
Discounts	11.40	35	15.64	48	15.31	47	12.38	38	14.98	46	10.42	32	6.19	19
Rewards program	1.63	5	4.23	13	5.21	16	8.47	26	8.47	26	7.82	24	15.31	47
Ease of switching between channels (online and in store)	1.63	5	2.93	9	5.21	16	6.84	21	8.79	27	10.75	33	9.45	29
Personalized service	4.56	14	9.12	28	8.47	26	13.03	40	8.47	26	15.31	47	14.33	44
Product availability	5.86	18	13.36	41	11.07	34	12.05	37	11.40	35	10.75	33	13.36	41
Value for money	16.61	51	17.92	55	13.03	40	8.79	27	8.47	26	7.82	24	9.45	29
Emotional connection with brand	6.51	20	5.54	17	6.19	19	8.47	26	8.14	25	7.49	23	8.47	26
Quality	15.96	49	15.64	48	16.94	52	13.03	40	12.05	37	4.89	15	5.54	17
Unique experiences	3.26	10	3.91	12	6.51	20	6.19	19	7.49	23	15.96	49	14.01	43
Other	1.63	5	0.98	3	0.65	2	0	0	0	0	0	0	0	0

Note. Table continues onto next page. Type in responses included sustainability (5 responses), trend-consciousness, style of clothing, fit of clothing, price, past experiences

Table 3.3

Most Important Factors When Deciding Where to Shop

	Ranking										
	8		9		10		11		Mean	*SD*	Total *N*
Factors	%	*N*	%	*N*	%	*N*	%	*N*			
Convenience (speed of service, locating product, checkout)	4.89	15	1.95	6	4.89	15	0	0	3.74	2.67	307
Discounts	4.89	15	7.17	22	1.63	5	0	0	4.39	2.44	307
Rewards program	12.70	39	13.68	42	21.50	66	0.98	3	7.07	2.53	307
Ease of switching between channels (online and in store)	16.61	51	22.15	68	14.33	44	1.30	4	7.15	2.40	307
Personalized service	12.70	39	7.82	24	5.21	16	0.98	3	5.70	2.51	307
Product availability	7.82	24	7.49	23	6.51	20	0.33	1	5.28	2.63	307
Value for money	11.73	36	2.61	8	3.26	10	0.33	1	4.36	2.71	307
Emotional connection with brand	8.79	27	17.26	53	22.15	68	0.98	3	6.73	2.96	307
Quality	2.28	7	1.95	6	11.40	35	0.33	1	4.32	2.84	307
Unique experiences	17.59	54	17.59	54	7.17	22	0.33	1	6.61	2.37	307
Other	0	0	0.33	1	1.95	6	94.46	290	10.67	1.66	307

Note. Type in responses included sustainability (5 responses), customer service, trend-consciousness, style of clothing, fit of clothing, price, past experiences

Table 3.4

Most Important Factors While Shopping

	Ranking													
	1		2		3		4		5		6		7	
Factors	%	*N*	%	*N*	%	*N*	%	*N*	%	*N*	%	*N*	%	*N*
Convenience (speed of service, locating product, checkout)	30.03	88	11.60	34	14.33	42	12.29	36	8.19	24	8.19	24	6.48	19
Discounts	10.58	31	13.31	39	18.77	55	17.75	52	9.56	28	8.87	26	6.14	18
Rewards program	1.71	5	2.73	8	5.12	15	9.56	28	13.31	39	12.97	38	15.36	45
Ease of switching between channels (online and in store)	1.02	3	2.39	7	5.12	15	2.73	8	11.95	35	14.68	43	12.97	38
Personalized service	4.78	14	10.92	32	10.92	32	11.60	34	14.33	42	13.31	39	12.29	36
Product availability	9.56	28	16.38	48	12.63	37	11.26	33	7.51	22	4.78	14	13.31	39
Value for money	16.04	47	15.36	45	12.63	37	11.26	33	8.53	25	6.48	19	5.46	16
Emotional connection with brand	3.75	11	6.48	19	5.12	15	4.78	14	6.83	20	5.80	17	10.24	30
Quality	18.43	54	15.36	45	12.97	38	12.97	38	11.26	33	5.80	17	2.05	6
Unique experiences	2.73	8	4.78	14	2.39	7	5.80	17	8.53	25	18.77	55	15.36	45
Other	1.37	4	0.68	2	0	0	0	0	0	0	0.34	1	0.34	1

Note. Table continues onto next page. Type in responses included sustainability (2 responses), customer service (2 responses), style of clothing, fit of clothing

Table 3.4

Most Important Factors While Shopping

	Ranking										
	8		9		10		11		Mean	*SD*	Total *N*
Factors	%	*N*	%	*N*	%	*N*	%	*N*			
Convenience (speed of service, locating product, checkout)	4.10	12	1.71	5	2.73	8	0.34	1	3.60	2.53	293
Discounts	8.87	26	4.78	14	1.37	4	0	0	4.36	2.38	293
Rewards program	11.60	34	12.97	38	13.99	41	0.68	2	6.70	2.36	293
Ease of switching between channels (online and in store)	18.09	53	16.72	49	13.65	40	0.68	2	7.10	2.20	293
Personalized service	10.58	31	6.48	19	4.78	14	0	0	5.34	2.45	293
Product availability	7.17	21	12.97	38	4.44	13	0	0	5.03	2.83	293
Value for money	12.97	38	6.48	19	4.44	13	0.34	1	4.60	2.85	293
Emotional connection with brand	6.14	18	18.77	55	30.72	90	1.37	4	7.32	2.87	293
Quality	1.02	3	1.02	3	17.75	52	1.37	4	4.55	3.18	293
Unique experiences	19.11	56	18.09	53	4.44	13	0	0	6.66	2.19	293
Other	0.34	1	0	0	1.71	5	95.22	279	10.74	1.43	293

Note. Type in responses included sustainability (2 responses), customer service (2 responses), style of clothing, fit of clothing

Table 3.5

Brand Relationships

	I have a strong connection to a particular brand(s)					I would stop patronizing a brand if they did not live up to my expectations or broke my trust (for example, if it came out that a brand whose core value is sustainability uses child labor)				
Likert Scale	%	*N*	Mean	*SD*	Total *N*	%	*N*	Mean	*SD*	Total *N*
Strongly agree	31.19	97	2.18	1.11	311	27.42	85	2.33	1.17	310
Agree	36.33	113				34.19	106			
Somewhat Agree	20.90	65				23.87	74			
Neither Agree nor Disagree	6.75	21				8.39	26			
Somewhat Disagree	4.18	13				5.16	16			
Disagree	0.64	2				0.97	3			
Strongly Disagree	0	0				0	0			

Note: Table continues to next page.

Table 3.5

Brand Relationships

	It is important to me that a brand be engaging and interact with me in store as well as online (via social media, emails, on the brand's website, etc.)					I would stop patronizing a brand if they did not engage with me or value my opinions				
Likert Scale	%	*N*	Mean	*SD*	Total *N*	%	*N*	Mean	*SD*	Total *N*
Strongly agree	16.50	51	2.76	1.38	309	12.30	38	3.11	1.39	309
Agree	33.33	103				22.98	71			
Somewhat Agree	26.54	82				29.77	92			
Neither Agree nor Disagree	11.33	35				18.77	58			
Somewhat Disagree	6.15	19				9.71	30			
Disagree	5.50	17				5.50	17			
Strongly Disagree	0.65	2				0.97	3			

Note: Table continues to next page.

Table 3.5

Brand Relationships

	It is important to me that a brand is sustainable and transparent in its business practices					It is important to me that a brand value my opinions, whether it be comments on their social media or website, or ideas for new products or fashion direction				
Likert Scale	%	*N*	Mean	*SD*	Total *N*	%	*N*	Mean	*SD*	Total *N*
Strongly agree	31.29	97	2.25	1.16	310	21.68	67	2.47	1.17	309
Agree	31.29	97				34.63	107			
Somewhat Agree	25.16	78				25.57	79			
Neither Agree nor Disagree	8.39	26				12.94	40			
Somewhat Disagree	1.94	6				3.56	11			
Disagree	1.61	5				1.29	4			
Strongly Disagree	0.32	1				0.32	1			

Table 3.6

Attitude Toward Retail Technology

	It excites me to see new and innovative technology in fashion retailers powered by artificial intelligence, such as cashier-less checkout technology and smart dressing rooms					The "just walk out" technology that Amazon has pioneered, which makes waiting in line to check out practically obsolete, makes me excited for the future of retail technology				
Likert Scale	%	*N*	Mean	*SD*	Total *N*	%	*N*	Mean	*SD*	Total *N*
Strongly agree	37.23	121	2.19	1.34	325	25.23	82	2.47	1.33	325
Agree	31.69	103				34.46	112			
Somewhat Agree	17.85	58				21.23	69			
Neither Agree nor Disagree	5.85	19				10.46	34			
Somewhat Disagree	4.00	13				4.92	16			
Disagree	1.85	6				2.77	9			
Strongly Disagree	1.54	5				0.92	3			

Note. Table continues onto next page.

Table 3.6

Attitude Toward Retail Technology

	Rebecca Minkoff's flagship store has an interactive screen in its fitting rooms that allow you to adjust the lighting, peruse styling options for the garments you've brought in, or request a different size or color. I would like to see fitting rooms like this from more retailers in the future				
Likert Scale	%	*N*	Mean	*SD*	Total *N*
Strongly agree	51.69	168	1.78	1.06	325
Agree	30.77	100			
Somewhat Agree	10.77	35			
Neither Agree nor Disagree	3.38	11			
Somewhat Disagree	1.85	6			
Disagree	1.54	5			
Strongly Disagree	0	0			

Table 3.7

Future Technologies Wanted from Fashion Retailers

	Ranking												
	1		2		3		4		5		Mean	*SD*	Total *N*
Technologies	%	*N*	%	*N*	%	*N*	%	*N*	%	*N*			
Smart dressing rooms	46.05	134	24.40	71	16.49	48	7.56	22	4.47	13	2.03	1.22	291
Interactive digital displays	11.34	33	32.99	96	29.21	85	15.81	46	9.62	28	2.82	1.18	291
Smart shelves	3.78	11	9.62	28	19.24	56	36.08	105	26.80	78	3.86	1.17	291
Cashier-less checkout	13.40	39	13.06	38	13.40	39	21.65	63	31.96	93	3.66	1.54	291
Personalized product recommendations	23.37	68	19.59	57	19.93	58	13.75	40	19.59	57	2.98	1.55	291
Robots	1.03	3	0	0	1.72	5	4.12	12	5.50	16	5.86	0.84	291
Other (type in)	1.03	3	0.34	1	0	0	1.03	3	2.06	6	6.78	0.81	291

Note. *Table continues onto next page. Type in responses included augmented reality, sustainable technology, smart tags, novel fabrics, and products size/style availability check*

Table 3.7

Future Technologies Wanted from Fashion Retailers

	Ranking						
	6		7		Mean	*SD*	Total *N*
Technologies	%	*N*	%	*N*			
Smart dressing rooms	1.03	3	0	0	2.03	1.22	291
Interactive digital displays	1.03	3	0	0	2.82	1.18	291
Smart shelves	4.12	12	0.34	1	3.86	1.17	291
Cashier-less checkout	5.84	17	0.69	2	3.66	1.54	291
Personalized product recommendations	3.44	10	0.34	1	2.98	1.55	291
Robots	78.01	227	9.62	28	5.86	0.84	291
Other (type in)	6.53	19	89.00	259	6.78	0.81	291

Note. *Type in responses included augmented reality, sustainable technology, smart tags, novel fabrics, and products size/style availability check*

Table 3.8

Online and In-store Activity

	I browse online to get information about a product					I browse online to get information about a product and buy that product online				
Likert Scale	%	*N*	Mean	*SD*	Total *N*	%	*N*	Mean	*SD*	Total *N*
All the Time	50.16	156	1.72	0.88	311	24.12	75	2.37	1.01	311
Usually	33.12	103				28.30	88			
Sometimes	12.86	40				36.66	114			
Seldom	2.57	8				8.68	27			
Never	1.29	4				2.25	7			

Note. Table continues onto next page

Table 3.8

Online and In-store Activity

	I browse online to get information about a product, but buy that product in store					I use my phone while I'm shopping in store				
Likert Scale	%	*N*	Mean	*SD*	Total *N*	%	*N*	Mean	*SD*	Total *N*
All the Time	20.71	64	2.46	1.03	309	26.69	83	2.50	1.22	311
Usually	29.13	90				25.08	78			
Sometimes	35.92	111				26.69	83			
Seldom	11.65	36				14.47	45			
Never	2.59	8				7.07	22			

Appendix B

- IRB approval
- Informed consent statement
- Recruitment script
- Email with survey link
- Course and contact list
- Survey: The Future of Brick-and-Mortar Fashion Retail

IRB approval

RE: Protocol #19-180 - entitled “The Future of Brick-and-Mortar Fashion Retail”

We have assigned your application the following IRB number: **19-180.** Please reference this number when corresponding with our office regarding your application.

The Kent State University Institutional Review Board has reviewed and approved your Application for Approval to Use Human Research Participants as Level I/Exempt from Annual review research. Your research project involves minimal risk to human subjects and meets the criteria for the following category of exemption under federal regulations:

· Exemption 2: Educational Tests, Surveys, Interviews, Public Behavior Observation

This application was approved on **April 23, 2019**.

*******Submission of annual review reports is not required for Level 1/Exempt projects. We do NOT stamp Level I protocol consent documents.*

For compliance with:

- DHHS regulations for the protection of human subjects (Title 45 part 46), subparts A, B, C, D & E

Informed Consent Statement

Welcome to “The Future of Brick-and-Mortar Fashion Retail,” a study that examines the Generation Z cohort in-store retail experiences.

Before taking part in this study, please read the consent form below and select "Yes" at the bottom of the page if you understand the statements and freely consent to participate in the study.

This study involves a brief survey in which participants will answer questions about what you as consumers value most in the customer experience, the advantages and drawbacks of brick-and-mortar retail shopping today, and what you wish to see change in the future. The survey will be distributed to college students in the Fashion Design and Merchandising program at Kent State.

The study is being conducted by professor Dr. Catherine Leslie (222F Rockwell Hall, 330-672-0169, cleslie1@kent.edu) and Ashlynn Thompson (athomp84@kent.edu) of Kent State University, and it has been approved by the Kent State University Institutional Review Board Protocol #____. No deception is involved, and the study involves no more than minimal risk to participants (i.e., the level of risk encountered in daily life).

Participation in the study typically takes 10 minutes. Participants will be asked a variety of questions about their online and in-store activity and shopping behavior, including their shopping preferences and decision-making processes. Participants will be asked about their brand relationships and attitude toward retail technology, shopping experiences, and personalization. Participants will also be asked to provide some demographic information.

Participation is strictly anonymous. All responses are treated as confidential, and in no case will responses from individual participants be identified. Rather, all data will be pooled and published in aggregate form only.

Participation is voluntary, refusal to take part in the study involves no penalty or loss of benefits to which participants are otherwise entitled, and participants may withdraw from the study at any time without penalty or loss of benefits to which they are otherwise entitled. Although all of the questions you will be asked are important, you may skip any question that you do not want to answer.

Students enrolled in courses at Kent State University may receive extra credit for taking part in the study. Any student who prefers not to participate in the study may complete an alternative activity for the same number of points.

If participants have further questions about this study or their rights, or if they wish to lodge a complaint or concern, they may contact the principal investigator, Dr. Catherine Leslie (222F Rockwell Hall, 330-672-0169, cleslie1@kent.edu) or Ashlynn Thompson (athomp84@kent.edu) or the Kent State University Institutional Review Board, at (330) 672-2704.

By checking “Yes” on the survey, you are indicating your consent to the above procedures and acknowledge you have been informed about this study’s purpose, procedures, possible benefits and risks. You are also acknowledging that you are voluntarily agreeing to participate in this study and are not waiving any of your legal rights. You may request a copy of this Consent Form for your records.

If you are 18 years of age or older, understand the statements above, and freely consent to participate in the study, check "Yes" button.

YES _______

Recruitment Script

Dear Professor ____________,

My name is Ashlynn Thompson, senior Fashion Merchandising major at Kent State. Currently, I am completing an Honors Thesis entitled "Brick and Mortar 2.0: The Future of Brick-and-Mortar Fashion Retail" with Dr. Catherine Leslie serving as my Thesis Advisor. The topic of this thesis is to explore the future retail format for brick-and-mortar fashion retailers based on research of current formats, consumer data, and new technologies.

This study involves a brief survey in which participants answer questions about what they as a Generation Z consumer value most in the customer experience, the advantages and drawbacks of brick-and-mortar fashion retail shopping today, and what aspects about retail they wish to see change in the future. The survey will only take about 10 minutes to complete and it is absolutley voluntary. The survey has been approved by the Institutional Review Board protocol #19-180.

I would like to inquire if you would be willing to send this survey to all students in your Italian Fashion and Culture course for my research. If possible, I would also like to know if extra credit could be given to those who participate to increase participation for this study.

The survey will be open to participants from September 23, 2019 to September 27, 2019. If you chose to assist in my research, I would send you the link on the first day (Sept 23rd), which you would send out to your students on the same day, then a follow up as a friendly reminder to remind your students about the survey if they have not already completed it.

I would be very grateful if you would consider my inquiries. Please let me know what you decide and do not hesitate to contact me if you have any questions. Looking forward to your response.

Email with Survey Link

Dear Professor ____________,

I would appreciate it if you could send this email with the link to the survey to students in your ____________ course today. Please stay posted for a friendly reminder from me later that week.

Overview for Students

My name is Ashlynn Thompson, senior Fashion Merchandising major at Kent State University, and I am currently completing an Honors Thesis. I would appreciate it if you would participate in my research by clicking the link below and filling out the survey entitled "The Future of Brick-and-Mortar Fashion Retail." The survey will ask questions about what you as a Generation Z consumer value most in the customer experience, the advantages and drawbacks of brick-and-mortar fashion retail shopping today, and what aspects about retail you wish to see changed in the future.

The **survey will only take about 10 minutes to complete** and it is **absolutely voluntary and anonymous**. The survey has been approved by the Institutional Review Board protocol #19-180.

Important Things to Note

The survey will be **open from Monday, September 23, 2019 to 11:59PM on Friday, September 27, 2019**.

Students if you receive this email in multiple classes **please only complete the survey once.** If you have questions or trouble accessing the link, please contact me via email at athomp84@kent.edu.

Please click the link below to access the survey:

https://kent.qualtrics.com/jfe/form/SV_3dtdViJPhqXOOih

Thank you for your time and participation!

Course #	Course Name	Enrollment	First Contact	Participating?	Response to Follow-Up?	Extra Credit?
		KSU - Main Campus				
FDM 20263-001	Fashion Retail Industry	119	9/10/19	yes	yes	no
FDM 20030-001	Apparel Analysis	58	9/10/19	yes	yes	yes
FDM 30260-001	Product Development	25	9/10/19	yes	yes	yes
FDM 30260-002	Product Development	33	9/10/19	yes	yes	yes
FDM 30260-003	Product Development	30	9/10/19	yes	yes	yes
FDM 40270-004	Fashion Marketing	30	8/26/19	yes	yes	yes
FDM 40270-003	Fashion Marketing	30	8/26/19	yes	yes	yes
FDM 40270-002	Fashion Marketing	34	9/10/19	yes	yes	no
FDM 40270-001	Fashion Marketing	34	9/10/19	yes	yes	yes
		KSU - Florence Campus				
FDM 35901-995	Italian Fashion & Culture	63	9/10/19	yes	yes	no
FDM 35901-996	Italian Fashion & Culture	61	9/10/19	yes	yes	no
FDM 30260-995	Product Development	36	9/10/19	yes	yes	no
FDM 30260-996	Product Development	37	9/10/19	yes	yes	no
		KSU - NYC Studio				
FDM 30260-004	Product Development	10	9/10/19	yes	yes	no
FDM 40270-005	Fashion Marketing	6	9/11/19	yes	yes	no
		Drexel University				
DSMR324	Retail Intersections: Social and Cultural Issues	22	8/29/19	yes	yes	yes
DSMR311	Visual Merchandising	18	9/17/19	yes	yes	no
DSMR231	Retail Operations	22	9/17/19	yes	yes	no
		Iowa State University				
AMD 372	Sourcing and Global Issues	69	8/29/19	yes	yes	no
		University of Delaware				
FASH 417	Fashion and Apparel Studies Research and Discovery	38	9/15/19	yes	yes	yes
FASH 213 - 010 & 080	Development of Contemporary Fashion: Cultural Expressions	39	9/10/19	yes	yes	no
FASH 224 - 010	Development of Fashion: 1600 to World War I	38	9/10/19	yes	yes	no
FASH 426 - 010	Fashion and Textile Collection Management	10	9/10/19	yes	yes	no
FASH 626 - 010	Fashion and Textile Collection Management	2	9/10/19	yes	yes	no
		University of Cincinnati				
FASH 2080	Fashion History	70	9/15/19	yes	yes	no
		University of North Texas				
CMHT 2790	Merchandising Career Development	63	9/10/19	yes	yes	yes
MDSE 3250	Product Development	44	9/10/19	yes	yes	yes
MDSE 4010	Global Sourcing	61	9/10/19	yes	yes	yes
MDSE 2350	Trend Forecasting	75	9/10/19	yes	yes	yes
MDSE 3950-001	Visual Merchandising and Promotion	54	9/10/19	yes	yes	no
MDSE 4790-002	Internship	23	9/10/19	yes	yes	no
	TOTAL	1254				

Figure 2. Course and contact list. Shows details about courses and instructors selected for the survey.

Survey: The Future of Brick-and-Mortar Fashion Retail

Start of Block: Default Question Block

Start of Block: Block 0

Q0
Informed Consent Statement

Welcome to "The Future of Brick-and-Mortar Fashion Retail," a study that examines the Generation Z cohort in-store retail experiences.

Before taking part in this study, please read the consent form below and select "Yes" at the bottom of the page if you understand the statements and freely consent to participate in the study.

This study involves a brief survey in which participants will answer questions about what they as consumers value most in the customer experience, the advantages and drawbacks of brick-and-mortar retail shopping today, and what they wish to see changed in the future. The survey will be distributed to college students.

The study is being conducted by professor Dr. Catherine Leslie (222F Rockwell Hall, 330-672-0169, cleslie1@kent.edu) and Ashlynn Thompson (athomp84@kent.edu) of Kent State University, and it has been approved by the Kent State University Institutional Review Board Protocol #19-180. No deception is involved, and the study involves no more than minimal risk to participants (i.e., the level of risk encountered in daily life).

Participation in the study typically takes 12 minutes. Participants will be asked a variety of questions about their online and in-store activity and shopping behavior, including their shopping preferences and decision-making processes. Participants will be asked about their brand relationships and attitude toward retail technology, shopping experiences, and personalization. Participants will also be asked to provide some demographic and retail experience information.

Participation is strictly anonymous. All responses are treated as confidential, and in no case will responses from individual participants be identified. Rather, all data will be pooled and published in aggregate form only.

Participation is voluntary, refusal to take part in the study involves no penalty or loss of benefits to which participants are otherwise entitled, and participants may withdraw from the study at any time without penalty or loss of benefits to which they are otherwise entitled. Although all of the questions you will be asked are important, you may skip any question that you do not want to answer.

Students enrolled in courses may receive extra credit for completion of the study. Any student who prefers not to participate in the study may complete an alternative activity for the same number of points.

If participants have further questions about this study or their rights, or if they wish to lodge a complaint or concern, they may contact the principal investigator, Dr. Catherine Leslie (222F Rockwell Hall, 330-672-0169, cleslie1@kent.edu) or Ashlynn Thompson (athomp84@kent.edu) or the Kent State University Institutional Review Board, at (330) 672-2704.

By checking “Yes” on the survey, you are indicating your consent to the above procedures and acknowledge you have been informed about this study’s purpose, procedures, possible benefits and risks. You are also acknowledging that you are voluntarily agreeing to participate in this study and are not waiving any of your legal rights. You may request a copy of this Consent Form for your records.

If you are 18 years of age or older, understand the statements above, and freely consent to participate in the study, check "Yes" button.

○ Yes (1)

○ No (2)

Skip To: End of Survey If Informed Consent Statement Welcome to “The Future of Brick-and-Mortar Fashion Retail,” a study... = No

End of Block: Block 0

Start of Block: Block 1

Block 1 Respond appropriately to how each question best describes you and your retail experience.

- - -

Q1 As of September 23, 2019, I am

- 18 (1)
- 19 (2)
- 20 (3)
- 21 (4)
- 22 (5)
- 23 (6)
- 24 (7)
- 25+ (8)

Skip To: End of Survey If As of September 23, 2019, I am = 25+

Q2 As of September 23, 2019, I am a

- Freshman (1)
- Sophomore (2)
- Junior (3)
- Senior (4)

Skip To: End of Survey If As of September 23, 2019, I am a = Freshman

Q3 I identify as

- ○ Male (1)
- ○ Female (2)
- ○ Prefer not to say (3)

Q4 I have completed at least one of the following:
2 or more fashion retail industry or fashion merchandising courses during my time at university An internship or co-op in the fashion industry

- ○ Yes (1)
- ○ No, neither of these (2)

Skip To: End of Survey If I have completed at least one of the following: 2 or more fashion retail industry or fashion merc... = No, neither of these

---

Q5 I have experience working in retail

- ○ Yes, at a fashion retailer (1)
- ○ Yes, at a non-fashion retailer (3)
- ○ No (2)

Q6 I am attending

- Kent State University main campus (1)
- Kent State University NYC Studio (2)
- Kent State University Florence (3)
- Drexel University (4)
- Iowa State University (5)
- University of Delaware (6)
- University of North Texas (7)
- University of Cincinnati (8)

End of Block: Block 1

Start of Block: Block 3

Block 3 Respond appropriately to how each question best describes your shopping behavior.

Q7 I tend to shop at fashion retailers for myself

- More than once a week (1)
- Once a week (2)
- Once a month (3)
- Once every couple months (4)
- Once a year or less (5)

Q8 Thinking about the amount of times I go shopping for myself at fashion retailers and how much I spend in a single trip, I tend to think of myself as an

- ◯ Avid shopper (1)
- ◯ Average shopper (2)
- ◯ Indifferent shopper (3)

Q9 I prefer to buy products in-store

- ◯ Strongly agree (1)
- ◯ Agree (2)
- ◯ Somewhat agree (3)
- ◯ Neither agree nor disagree (4)
- ◯ Somewhat disagree (5)
- ◯ Disagree (6)
- ◯ Strongly disagree (7)

End of Block: Block 3

Start of Block: Block 4

Q10 Respond appropriately to how each question best describes your attitude toward retail technology.

	Strongly agree (1)	Agree (2)	Somewhat agree (3)	Neither agree nor disagree (4)	Somewhat disagree (5)	Disagree (6)	Strongly disagree (7)
It excites me to see new and innovative technology in fashion retailers powered by artificial intelligence, such as cashier-less checkout technology and smart dressing rooms (1)	o	o	o	o	o	o	o
The “just walk out” technology that Amazon has pioneered, which makes waiting in line to check out practically obsolete, makes me excited for the future of retail technology (2)	o	o	o	o	o	o	o

Rebecca Minkoff's flagship store has an interactive screens in its fitting rooms that allow you to adjust the lighting, peruse styling options for the garments you've brought in, or request a different size or color. I would like to see fitting rooms like this from more retailers in the future (3)	○	○	○	○	○	○	○

Display This Question:

If Respond appropriately to how each question best describes your attitude toward retail technology. = It excites me to see new and innovative technology in fashion retailers powered by artificial intelligence, such as cashier-less checkout technology and smart dressing rooms [Strongly agree]

Or Respond appropriately to how each question best describes your attitude toward retail technology. = It excites me to see new and innovative technology in fashion retailers powered by artificial intelligence, such as cashier-less checkout technology and smart dressing rooms [Agree]

Or Respond appropriately to how each question best describes your attitude toward retail technology. = It excites me to see new and innovative technology in fashion retailers powered by artificial intelligence, such as cashier-less checkout technology and smart dressing rooms [Somewhat agree]

Or Respond appropriately to how each question best describes your attitude toward retail technology. = It excites me to see new and innovative technology in fashion retailers powered by artificial intelligence, such as cashier-less checkout technology and smart dressing rooms [Neither agree nor disagree]

Q10a I would like to see more of these technologies in stores in the future. Click and drag options to rank them with **1 being the highest and 7 being the lowest**. You have the opportunity to type in an answer if none of the choices apply to you.

_______ Smart dressing rooms (1)
_______ Interactive digital displays (2)
_______ Smart shelves (3)
_______ Cashier-less checkout (4)
_______ Personalized product recommendations (5)
_______ Robots (6)
_______ Other (type in) (7)

End of Block: Block 4

Start of Block: Block 5

Q11 Respond appropriately to how each question best describes your attitude toward the retail shopping experience.

	Strongly Agree (1)	Agree (2)	Somewhat agree (3)	Neither agree nor disagree (4)	Somewhat disagree (5)	Disagree (6)	Strongly disagree (7)
I believe the experience of buying something is just as important as the product itself (1)	o	o	o	o	o	o	o
I would be more likely to return to a store if it had engaging and unique experiences or events that fit the brand aesthetic (2)	o	o	o	o	o	o	o
STORY is a concept store in New York that sells merchandise like a traditional store, changes its products every 3-8 weeks like an art gallery, and re-invents itself each time with a	o	o	o	o	o	o	o

new theme. I would be more likely to patronize a retailer that concentrated their efforts on personalized customer experiences that are fun and creative like STORY (3)

End of Block: Block 5

Start of Block: Block 6

Q12 Respond appropriately to how each question best describes your attitude toward retail personalization.

	Strongly Agree (1)	Agree (2)	Somewhat agree (3)	Neither agree nor disagree (4)	Somewhat disagree (5)	Disagree (6)	Strongly disagree (7)
I expect a shopping experience that is tailored to my needs and shopping preferences (1)	o	o	o	o	o	o	o
I would be more loyal to a brand that tailors its shopping experience to my individual needs (2)	o	o	o	o	o	o	o

End of Block: Block 6

Start of Block: Block 7

Block 7 Respond appropriately to how each question best describes your shopping behavior. Click and drag options to rank them with **1 being the highest and 8 being the lowest**. You have the opportunity to type in an answer if none of the choices apply to you.

Q13 Thinking about what makes me decide where to purchase a product, the following are the most important factors to me

______ Convenience (speed of service, locating product, checkout) (1)
______ Personalized service (2)
______ Discounts (3)
______ Rewards program (4)
______ Ease of switching between channels (online and in-store) (6)
______ Unique experiences (7)
______ Product availability (8)
______ Value for money (11)
______ Emotional connection with brand (12)
______ Quality (13)
______ Other (10)

Q14 Once I have chosen a store, these are the most important things to me when I am shopping

______ Convenience (speed of service, locating product, checkout) (1)
______ Personalized service (2)
______ Discounts (3)
______ Rewards program (4)
______ Ease of switching between channels (online and in-store) (6)
______ Unique experiences (7)
______ Product availability (8)
______ Value for money (11)
______ Emotional connection with brand (12)
______ Quality (13)
______ Other (10)

Q15 Looking at the answers from the previous question, I am NOT satisfied with the degree to which I am receiving one or all of these things from the places I shop. Select all that apply.

- ▢ Not applicable. I am satisfied (1)
- ▢ Convenience (speed of service, locating product, checkout) (2)
- ▢ Personalized service (3)
- ▢ Discounts (4)
- ▢ Rewards Program (5)
- ▢ Ease of switching between channels (online and in-store) (6)
- ▢ Unique experiences (7)
- ▢ Product availability (8)
- ▢ Value for money (9)
- ▢ Emotional connection with brand (10)
- ▢ Quality (11)
- ▢ Other (12) ____

End of Block: Block 7

Start of Block: Block 8

Q16 Respond appropriately to how each question best describes your brand relationships.

	Strongly Agree (1)	Agree (2)	Somewhat agree (3)	Neither agree nor disagree (4)	Somewhat disagree (5)	Disagree (6)	Strongly disagree (7)
I have a strong connection to a particular brand(s) (1)	○	○	○	○	○	○	○
I would stop patronizing a brand if they did not live up to my expectations or broke my trust (for example, if it came out that a brand whose core value is sustainability uses child labor) (2)	○	○	○	○	○	○	○
It is important to me that a brand be engaging and interact with me in-store as well as online (via social media, emails, on the brand's website, etc.) (3)	○	○	○	○	○	○	○

I would stop patronizing a brand if they did not engage with me or value my opinions (4)	○	○	○	○	○	○	○
It is important to me that a brand is sustainable and transparent in its business practices (5)	○	○	○	○	○	○	○
It is important to me that a brand value my opinions, whether it be comments on their social media or website, or ideas for new products or fashion direction (6)	○	○	○	○	○	○	○

Display This Question:

If Respond appropriately to how each question best describes your brand relationships. = It is important to me that a brand is sustainable and transparent in its business practices [Strongly Agree]

Or Respond appropriately to how each question best describes your brand relationships. = It is important to me that a brand is sustainable and transparent in its business practices [Agree]

Or Respond appropriately to how each question best describes your brand relationships. = It is important to me that a brand is sustainable and transparent in its business practices [Somewhat agree]

Or Respond appropriately to how each question best describes your brand relationships. = It is important to me that a brand is sustainable and transparent in its business practices [Neither agree nor disagree]

Q16a Being sustainable impacts my decision to buy from a brand

- ◯ Strongly agree (1)
- ◯ Agree (2)
- ◯ Somewhat agree (3)
- ◯ Neither agree nor disagree (4)
- ◯ Somewhat disagree (5)
- ◯ Disagree (6)
- ◯ Strongly disagree (7)

Display This Question:

If Respond appropriately to how each question best describes your brand relationships. = It is important to me that a brand value my opinions, whether it be comments on their social media or website, or ideas for new products or fashion direction [Strongly Agree]

Or Respond appropriately to how each question best describes your brand relationships. = It is important to me that a brand value my opinions, whether it be comments on their social media or website, or ideas for new products or fashion direction [Agree]

Or Respond appropriately to how each question best describes your brand relationships. = It is important to me that a brand value my opinions, whether it be comments on their social media or website, or ideas for new products or fashion direction [Somewhat agree]

Or Respond appropriately to how each question best describes your brand relationships. = It is important to me that a brand value my opinions, whether it be comments on their social media or website, or ideas for new products or fashion direction [Neither agree nor disagree]

Q16b I would give my opinion on new product ideas or fashion direction for a brand if given the opportunity

- Strongly agree (1)
- Agree (2)
- Somewhat agree (3)
- Neither agree nor disagree (4)
- Somewhat disagree (5)
- Disagree (6)
- Strongly disagree (7)

End of Block: Block 8

Start of Block: Block 9

Q17 Respond appropriately to how accurately each question describes your online and in-store activity.

	All the time (1)	Usually (2)	Sometimes (3)	Seldom (4)	Never (5)
I browse online to get information about a product (1)	○	○	○	○	○
I browse online to get information about a product and buy that product online (2)	○	○	○	○	○
I browse online to get information about a product, but buy that product in-store (3)	○	○	○	○	○
I use my phone while I'm shopping in-store (4)	○	○	○	○	○

Display This Question:

If Respond appropriately to how accurately each question describes your online and in-store activity. = I use my phone while I'm shopping in-store [All the time]

Or Respond appropriately to how accurately each question describes your online and in-store activity. = I use my phone while I'm shopping in-store [Usually]

Or Respond appropriately to how accurately each question describes your online and in-store activity. = I use my phone while I'm shopping in-store [Sometimes]

Q17a I use my phone to do the following while shopping in-store. Select all that apply.

- ☐ Look up product information (1)
- ☐ Comparison shop (2)
- ☐ Shop online for items not in-store (3)
- ☐ Look up discounts/coupons (4)
- ☐ Use social media (5)
- ☐ Text (6)
- ☐ Check email (7)
- ☐ Other (8) ____

Q18 I expect the same products and services I am offered online to be offered in-store (for example, the ability to customize a product)

- ◯ Strongly Agree (1)
- ◯ Agree (2)
- ◯ Somewhat agree (3)
- ◯ Neither agree nor disagree (4)
- ◯ Somewhat disagree (5)
- ◯ Disagree (6)
- ◯ Strongly disagree (7)

Display This Question:

If I expect the same products and services I am offered online to be offered in-store (for example,... = Strongly Agree

Or I expect the same products and services I am offered online to be offered in-store (for example,... = Agree

Or I expect the same products and services I am offered online to be offered in-store (for example,... = Somewhat agree

Or I expect the same products and services I am offered online to be offered in-store (for example,... = Neither agree nor disagree

Q18a I would patronize a brand less or stop patronizing that brand altogether if the same products and services were not offered online and in store

- Strongly agree (1)
- Agree (2)
- Somewhat agree (3)
- Neither agree nor disagree (4)
- Somewhat disagree (5)
- Disagree (6)
- Strongly disagree (7)

Q19 In my opinion, these are the best aspects of online shopping. Select all that apply.

- A wide selection of merchandise choices (1)
- Product reviews (2)
- Quick transaction processing (3)
- Convenience (4)
- Personalized recommendations (5)
- Ease of locating products (6)
- Other (7) ____

Q20 I would like to see the best aspects of online shopping integrated into the in-store experience

- Strongly agree (1)
- Agree (2)
- Somewhat agree (3)
- Neither agree nor disagree (4)
- Somewhat disagree (5)
- Disagree (6)
- Strongly disagree (7)

End of Block: Block 9

Start of Block: Block 10

Block 10 Respond appropriately to what you would like to change about the current in-store shopping experience.

Q21 If I could change the in-store shopping experience, these are some things I would change. Select all that apply.

- ▢ Not applicable. I do not want to change anything (12)
- ▢ More convenient experience (1)
- ▢ More engaging experience (2)
- ▢ More personalized (3)
- ▢ More like the digital shopping experience (4)
- ▢ Wider variety of product choices (5)
- ▢ Greater product availability (6)
- ▢ Greater value for money (7)
- ▢ Better quality (8)
- ▢ More discounts (9)
- ▢ Rewards program (11)
- ▢ Other (10) ____

End of Block: Block 10