

## Retail Consumer Data

# Meet Gen Z

Results from a Cybertill sponsored YouGov survey of 18-24 year olds living in the UK. The survey covered topics such as in-store technology, click and collect, omnichannel shopping, experiential retailing, and loyalty.



The media is shouting about Gen Z, and retailers are listening, but a majority of the research on 18-24 year olds is US-based. **We're changing that.**

**Ian Tomlinson, CEO, Cybertill**

## Who are Gen Z

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Gen Z are largely misunderstood, and much like Millennials, are pigeonholed by the media. Lazy, selfish, swipe zombies, insatiable in their quest for makeup tutorials and cat videos. But what is actually relevant when it comes to how they consume? And how can retailers figure out what really matters?

When we were looking for data about Gen Z to share with our retail customers, we noticed a considerable gap in research in the UK. A majority of the information UK retailers have access to about Gen Z is largely based on the US market. So, we sponsored a survey with YouGov which digs deep into the omnichannel preferences of the Gen Z consumer, as well as Millennials and other generations. We hope this report gives you insight into the next generation of earners and shoppers, and what you can be doing now in order to prepare for the future.

# Gen Z shopping preferences at a glance



**70%**

said it is most frustrating when they can't find a desired item in-store



**49%**

of in-store fashion purchases are influenced by ecommerce



**18%**

Only said that VIP events would encourage them to sign up for a loyalty scheme



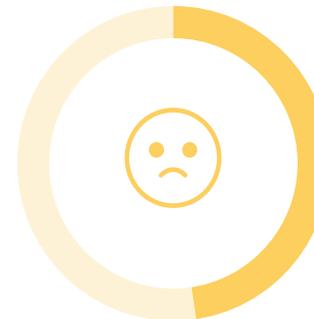
**55%**

voted contactless payment to be the most valuable in-store tech, followed by self-stock check (38%)



**57%**

find queuing for fitting rooms in-store most frustrating



**65%**

of Gen Z don't like it when shop staff approach them when they enter a shop



According to population statistics, there are 2.25 billion Gen Z'ers world-wide and only 1.7 billion Millennials.

**Jonathan Kendall, Global Ops Director, De Beers Forevermark**

Speaking in Hong Kong at the International Jewellery Show 2018

# Gen Z shops on every channel

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Across the board, stores influence consumers to make online purchases more often than online browsing influences shoppers to make in-store purchase, except electricals which are mostly researched online and bought in-store.

Gen Z shopping preferences differ depending on what they are buying, and they often browse and shop across various channels. For example, browsing online, then going in-store to purchase, further reinforcing the importance of having a seamless omnichannel presence as consumers move across the various shopping channels throughout their consumer journey.

32% browse and buy fashion in-store, compared to 23% who browse and buy online. Nearly half of all in-store fashion purchases Gen Z make are assisted by browsing online.

Electricals purchases are heavily influenced by online browsing, with two thirds of electrical purchases in-store assisted by ecommerce.

For a generation that has a reputation for really needing to be impressed, we were surprised to find that most people in the Gen Z age group are not really bothered by experiential (i.e. in-store product demonstrations, events, testers, etc) features to motivate them to shop in-store.

# Gen Z shopping preferences, by sector

Most Gen Z consumers don't have specific shopping channel preferences and thus shop across a mixture of online and in-store channels, reinforcing the importance of a seamless omnichannel experience. Grocery is the exception.



# No one puts Gen Z in a queue

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Gen Z hate queuing in-store. More than any other age group, 37% of Gen Z find queuing for the checkout frustrating and 57% find queuing for the fitting rooms frustrating.

However, the store is still incredibly important to Gen Z. They like shopping in-store because of the immediacy of being able to take products home right away, and not have to wait in for delivery.

86% of Gen Z voted the biggest frustration is when an item is marked 'in-stock' online on a retailer's website, but not available when you go specifically to find it in-store. So, if you mark something as in stock in a shop location on your website, it better be there. Or, make online stock reservations to drive footfall to store a big call-to-action on your website.

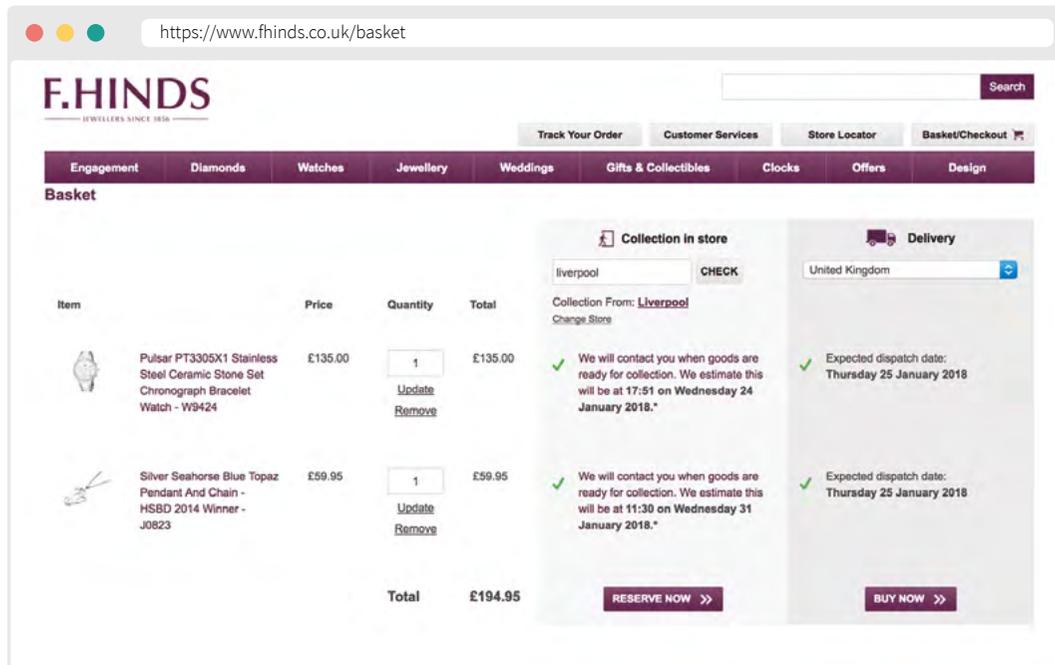
Overall, Gen Z are much more interested in helping themselves and get frustrated when shop staff approach them in-store. A huge proportion, 70% of Gen Z said they find it frustrating when they can't find a desired item in-store, on their own.

Retailers should invest in technology that allows for self checkout or self stock check in-store and on websites if they want to entice Gen Z and keep them coming back.

**“Despite expecting to see dramatic differences between the Millennials and Generation Z, the results were actually very similar. The only instances where there were differing results was when comparing the answers of over 55's to Generation Z or Millennials.**

*Ian Tomlinson, CEO, Cybertill*

# Meeting Gen Z demands



“As a jeweller, we tend to only have one of any particular line in-stock. We needed a reliable infrastructure to support our omnichannel initiatives, and the Cybertill’s RetailStore platform gives us this.”

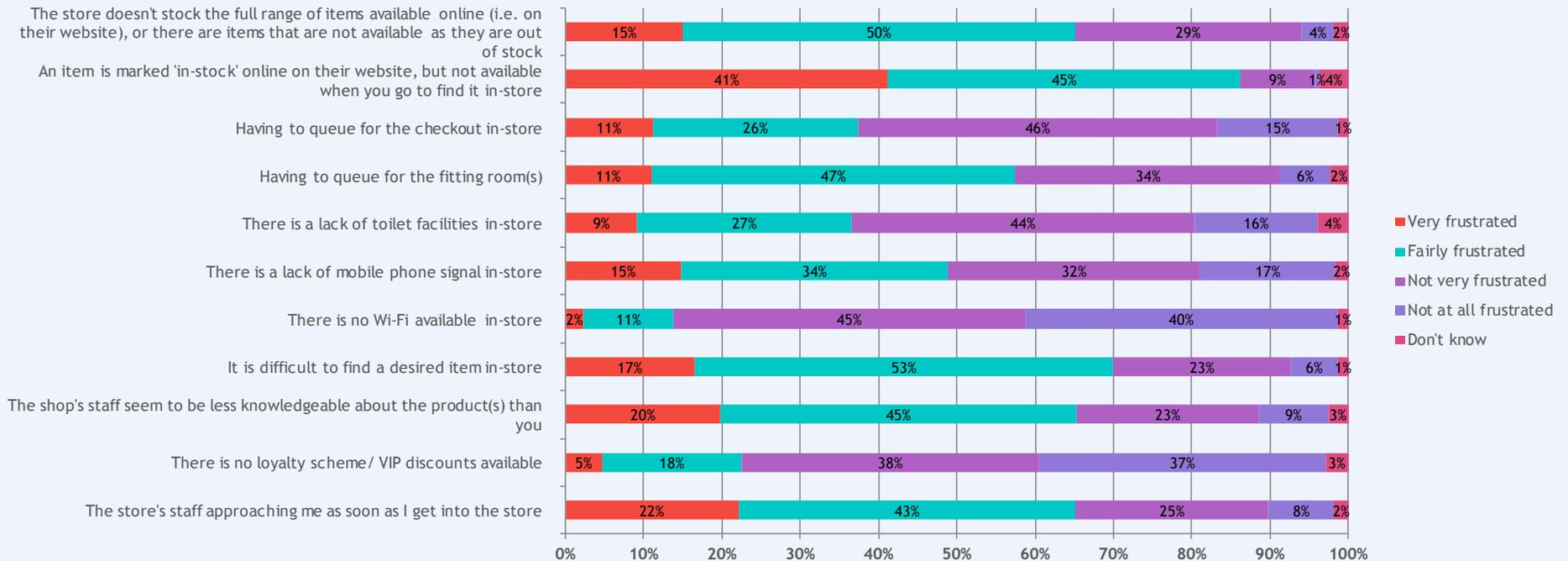
Paul Hinds, IT Director, F.Hinds

Cybertill customer since 2013

F.Hinds’ clever reserve and collect system shows when a customer will be able to view an item in any store. If an item is in stock at a specific store, collection can be arranged for as soon as two hours from reservation. Offering pay in-store instead of pay online ensures Gen Z customers aren’t out of pocket if considering more than one style.

# Gen Z in-store frustrations

Gen Z are most frustrated by the prospect of seeing an item listed in stock online and then not being able to get it in-store.



# Gen Z and click and collect

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Even though a dedicated click and collect entrance and car park may appeal to older consumers, Gen Z are not really bothered about it. However, a dedicated area to pick up collection goods is important, i.e. a till separate from the main checkout till.

When picking up a click and collect order, 48% of Gen Z feel frustrated when they are unable to retrieve their order confirmation email on a mobile due to poor mobile signal in-store. Remember Gen Z queue aversion? This is definitely something that could cause a queue at a collection till. What frustrates Gen Z the most about click and collect is when an item they ordered arrives later than promised.

When choosing click and collect, what Gen Z (and Millennials) want the most is real-time updates via text message, email or push notification and to know exactly when they can their item up. This is almost more important than the speed in which Gen Z consumers get the items.

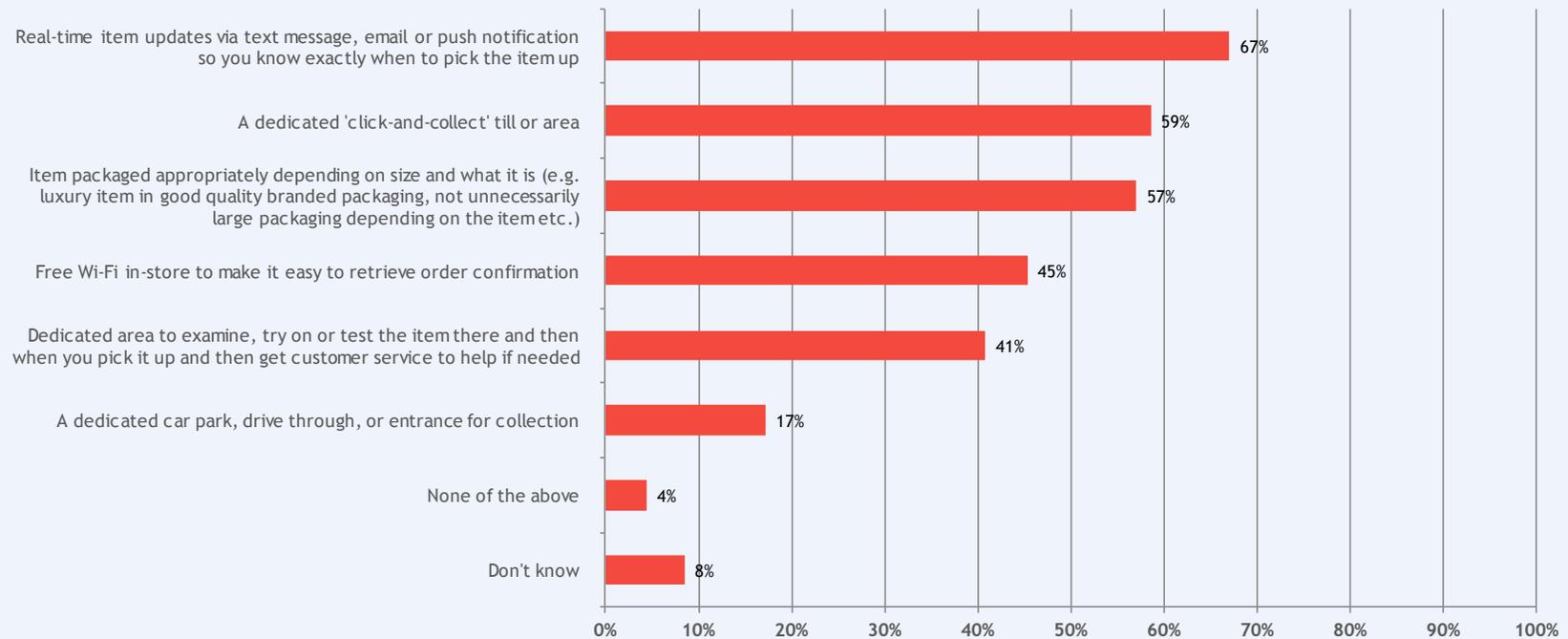
Consumers over 35 years old favour ease over information and want a dedicated 'click and collect' till or area above everything else. Whilst many retailers are beginning to invest in click and collect drive throughs and car parks, Gen Z are not bothered by this.

**“It’s more important to tell your customers exactly when they will receive their order so that they can, for example, go and pick it up on their lunch break, rather than to tell them a vague version of ‘next day.’**

*Ian Tomlinson, CEO, Cybertill*

# What Gen Z wants from click and collect

When asked to imagine buying an item online and collecting it in-store, Gen Z preferred:



# How Gen Z shop with tech in-store

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Gen Z are all for the self-help; not wanting to speak to shop staff to check stock levels and would rather do it themselves.

A majority of Gen Z chose in-store technology that made them more self sufficient whilst shopping. 38% want self-stock check. 35% want self-check out.

34% of Gen Z want touch screen displays in fitting rooms (i.e. to request a different size/ colour).

The majority of Gen Z (55)% said contactless/mobile payment would enhance their overall in-store shopping experience.

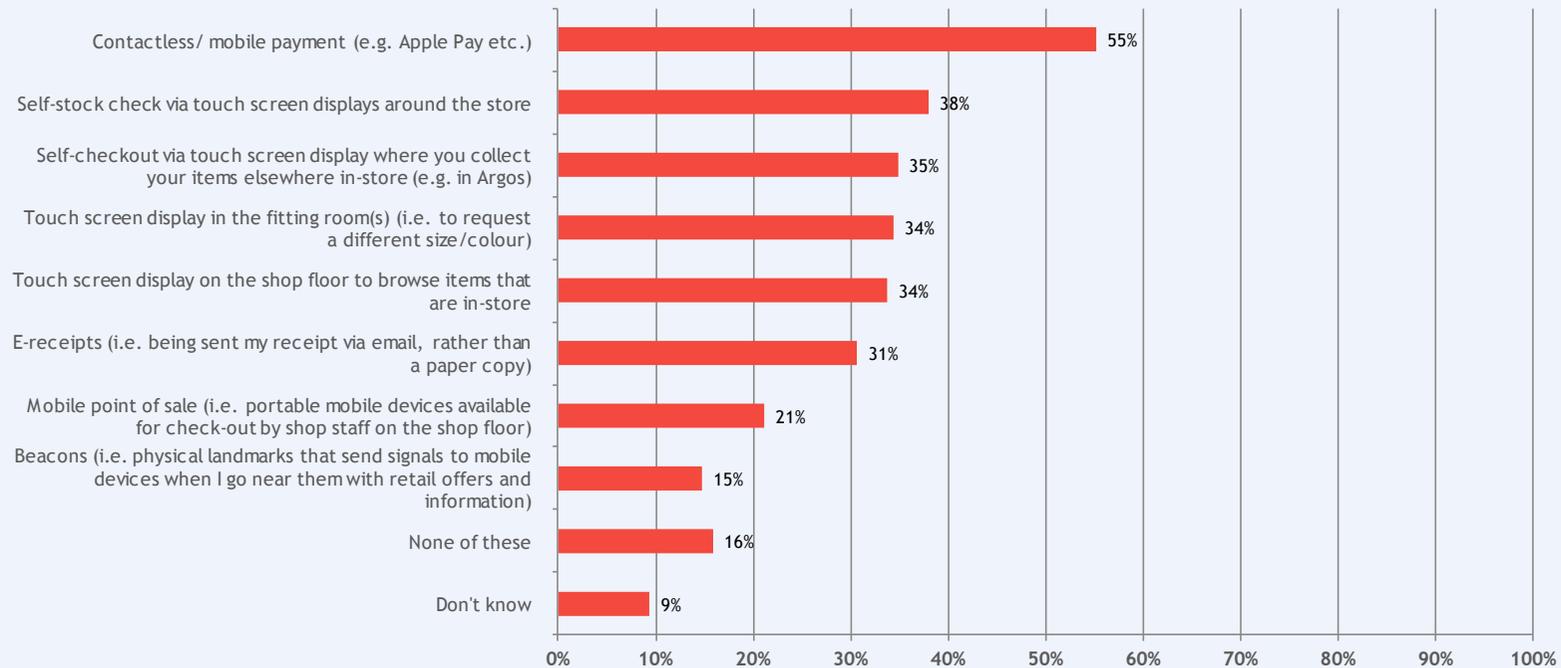
Surprisingly, some of the tech that the media has been saying is 'must have' over the past 5 years or so, Gen Z want nothing to do with. For example, Gen Z do not think that beacon technology (landmarks that send signals to mobile devices when you go near them with retail offers and information) would enhance their overall in-store shopping.

16% of Gen Z don't care for in-store technology and said that none of the options would enhance their shopping experience.



# Gen Z in-store technology desires

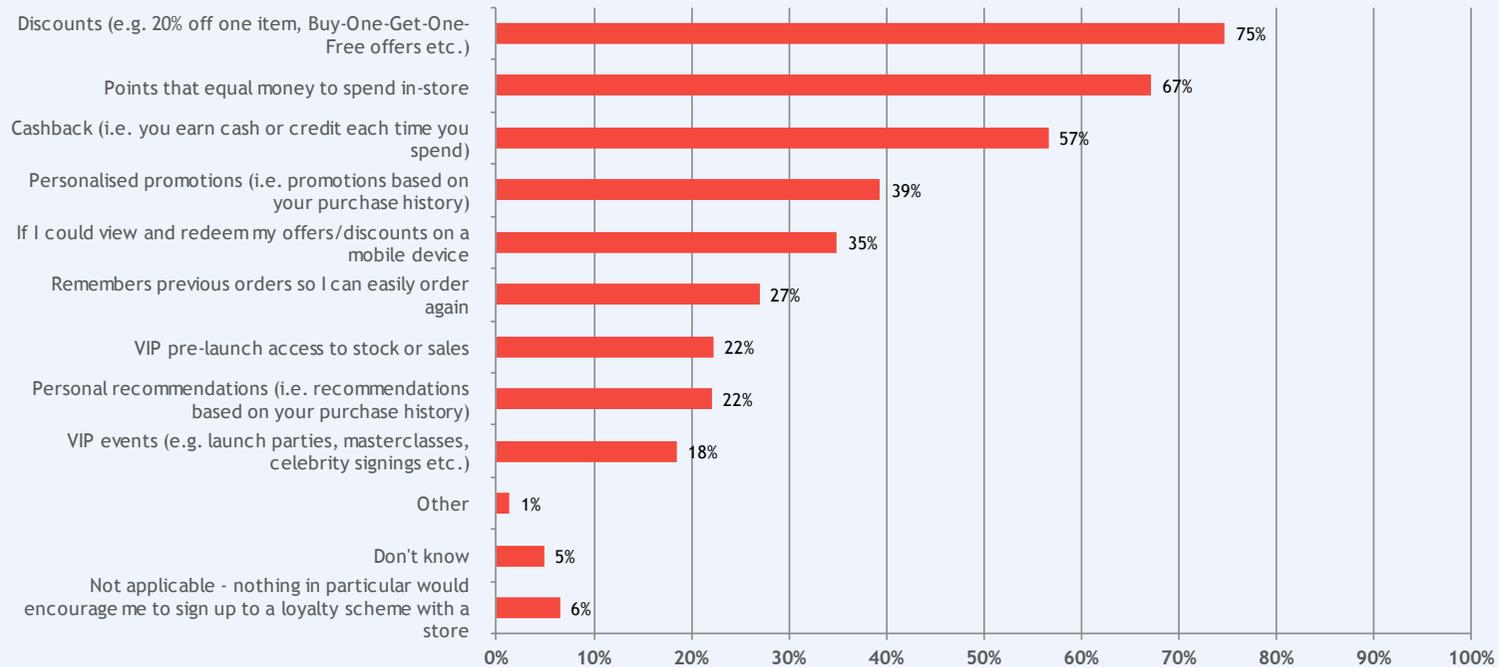
Payment technology in-store takes the lead significantly as a preference when Gen Z were asked about what kind of technology would enhance their experiences in-store.





# Enticing Gen Z with loyalty

Gen Z want promotions, not experiences when it comes to loyalty programmes.



# Research methodology

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## **The Research**

The online YouGov Survey was completed by 2004 GB adults aged between 18-55+. A total of 973 males and 1031 females took part.

The analysis has been broken down into the demographics of 183 Generation Z (18-24), 304 Millennials (25-34) and then participants age 35-55+.

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For press enquiries, or to request access to the raw data, please contact [marketing@cybertill.co.uk](mailto:marketing@cybertill.co.uk)

# Serve your customers better

Cybertill's RetailStore platform can help you create a more personalised and streamlined experience for your customers and staff. When your business operates online and in-store, the till is not just a point of sale, but instead, a point of service. Cybertill's RetailStore platform supports omnichannel initiatives providing:

- ▶ Outstanding **POS software** with **real-time**, secure stock, sales, and customer data visibility
- ▶ Cloud-based, modular **complete retail management** platform with enterprise merchandising and warehousing options including automated and in-transit stock reservations
- ▶ Omnichannel sales and returns processing including **click and collect**, dropship, and inter-store transfers
- ▶ Enhanced customer experience with **touch screen mobile POS** and **e-receipt** options
- ▶ Advanced **real-time** reporting including accounting, budgeting and forecasting
- ▶ **Seamless integration** into existing ERP, accounting, ecommerce systems, and more
- ▶ **Marketplace** modules for multi-channel online selling
- ▶ CRM module with **clienttelling** options to personalise your omnichannel marketing
- ▶ Modules for bespoke **in-store services** such as workshop, VIP customer service and repairs



# Over 700 retailers and brands trust Cybertill

**F.HINDS**  
JEWELLERS SINCE 1856



**MUSTO**

**DANIEL**  
FOOTWEAR



  
**Barnardos**

Let's crack this omnichannel thing together.

[cybertill.com/arrange-a-demo](https://cybertill.com/arrange-a-demo)

**Cybertill**

Cybertill provides complete retail management solutions for multi-store retailers and brands committed to improving customer experience. Its dedicated cloud point of sale platforms, RetailStore and CharityStore enable a real-time single view of stock, sales, and customers across shops, mobile points of sale, click and collect points, franchises, concessions, and ecommerce.

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