

# **Are Millennials Brand-loyal in the Apparel Industry?**

**Bachelor Project submitted for the degree of  
Bachelor of Science HES in International Business Management**

by

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## Declaration

This Bachelor Project is submitted as part of the final examination requirements of the Haute École de Gestion de Genève, for the Bachelor of Science HES-SO in International Business Management.

The student accepts the terms of the confidentiality agreement if one has been signed. The use of any conclusions or recommendations made in the Bachelor Project, with no prejudice to their value, engages neither the responsibility of the author, nor the adviser to the Bachelor Project, nor the jury members nor the HEG.

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Geneva, June 3<sup>rd</sup>, 2019

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# Executive Summary

This thorough study in consumer insights about millennials and the apparel industry aims at understanding what is going on in their minds and to which extent theories established by researchers and scholars are reflective of their loyalty towards brands.

The literature review will give you, readers, the palette of the branding concepts which are complex, and these ones' goal is to group unique individuals into a common strategy that will deliver a clear and concise message to them.

Regarding the apparel industry, you will have an outlook of its evolution, going from business aspects to sociological facts. This industry is extremely interesting as for some it is seen as a basic need, but to others it may be considered as a mean of self-expression and identity, which makes it very broad and flexible to each individual.

Finally, the last pillar of this research is the millennial generation in terms of its characteristics (own and cross-generational), purchasing habits and personal traits. This path will allow you to have a global understanding and an overview of the main concepts and aspects needed to identify the gaps to be solved by this paper.

The methodology used in this qualitative research paper for the primary data collection was interviews with experts and focus groups with millennials. These two types of exchanges were focusing on three main pillars for each. For experts, millennials insights and characteristics, their purchasing habits and their loyalty toward brands. For focus groups: appearance and style questions, purchasing habits and brands.

The participants were selected thoroughly with the objective of diversifying profiles and advices as much as possible. In total, 19 millennials and 4 experts participated in the research project.

Findings and tables show contrasts in millennials' profiles but are aligned with the specialists' testimonies and the literature review: this generation is very brand-loyal and not so different from previous ones, they constantly seek for self-discovery and must be targeted according to their interests and lifestyle instead of mere generation. Companies must not lose their identity for it is the only solution for them to be appealing to this generation, affected by the butterfly syndrome, which must not be cured but accepted.

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# 1. Introduction

## 1.1 Context

In order to allow readers to better understand the whole concept of this research paper, the author would like to describe how this one is structured and organized. Throughout this introduction, the main theoretical principles that will be involved in this bachelor thesis, as well as the global contexts treating the sector, the millennials as well as brand-loyalty as a whole, will be treated.

(Howe & Strauss 2000), generation theorists, claim that the environment does have an influence on the profile of someone born in a specific time period, as well as its everyday habits in terms of consumer behavior, lifestyle and purchasing (Gurău 2012).

This research will highlight the influence of the environment onto a specific segment, more specifically the one in the apparel industry, as well as defining which one is more influenced by the other, between the industry itself and the millennials: who at the end of the day is a concrete follower of the movement? How does this such special generation communicate and identify itself with the apparel industry? How does it affect the business environment and this generation's surrounding?

As millennials have a patchwork of conflicting expectations and very contrasting profiles, it is quite difficult to understand and keep them. Indeed, there are different types of Generation Y customers that vary according to their interests towards the apparel industry as well as the importance of this one in their all day life (Kiner 2017).

Similar to other generations and thus according to the Maslow's pyramid, they have a strong desire for belonging and acceptance but at the same time, they categorically refuse to be put in the same bag as others and persist in demonstrating how unique and different they are, which in a way can be seen as a contradiction.

How does it link to loyalty? As millennials want to distinguish themselves, they will, as said above, still align themselves to it socially. In order to do so, they get inspired by one another, leading them to end up buying the same brands as their peers, either by observation or reference, trust and word of mouth (Chan and Wong 2012).

However, they are very flexible and do not hesitate to switch to another brand if this one does not align with their standards anymore or simply by pure curiosity (also known as the butterfly syndrome).

This paper will go through the main theoretical concepts, researches and data collection toward three main pillars: brand-loyalty, the apparel industry and millennials themselves.

The research aims to understand what is going on in their minds and contrast between this generation's self-reflection and experts' point of view on the subject.

## **2. Literature Review**

### **2.1 Branding**

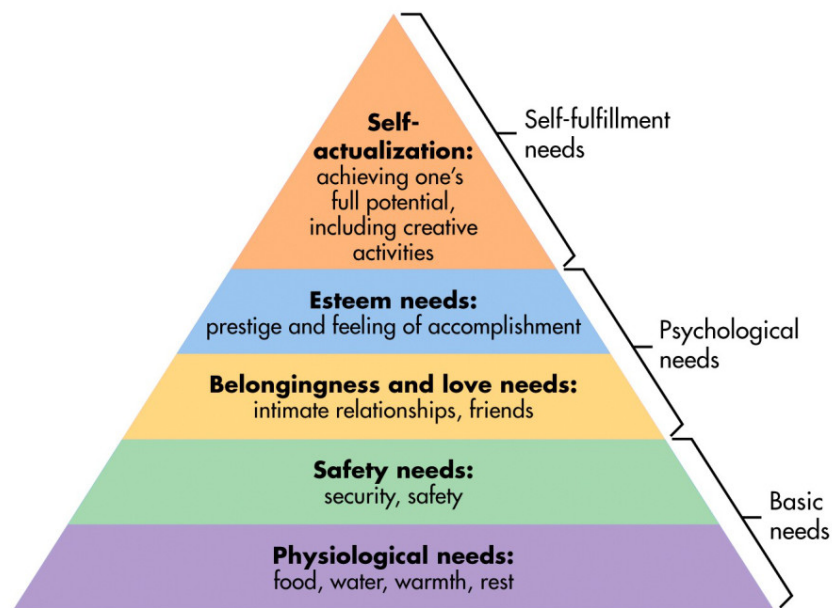
#### **2.1.1 Consumer Behavior**

In marketing, consumer behavior is complex and consists of various pivotal elements. As every human-being is unique, it has been shown that there are correlations and similarities in people's/consumer buying behavior. These similarities are called behavioral patterns (Cant, Strydom, Jooste, du Plessis 2009) and are used as a way to simply target consumers per category in order to ease the process of building marketing strategies, which without these patterns, strategies such as marketing mix and definition of target markets would not be possible.

By applying consumer behavior, more specifically to understand those behavioral patterns; enable to divide potential customers into groups with common needs, goals and desires. By doing so, we arrive to one of the biggest concepts in consumer behavior, the Maslow's Pyramid.

Indeed, he built a hierarchy of needs according to their importance: Abraham Maslow believed that *"all humans constantly try to learn more about themselves and try to be beneficial for the society"* (Stenroos, Lerch 2014):

**Figure 1 – Maslow's Pyramid**



Again, according to Maslow, the consumer's needs have a degree of importance, for instance hierarchy, that needs to be satisfied. The most important, the physiological, consists of needs which without them an individual wouldn't be able to survive (purple floor, bottom). The second floor in green is considered as a basic need with physiological ones, indicating that human beings need to feel protected and secure. A further example except from the hereabove mentioned would be a safe environment or health.

The third floor (yellow) is encompassed by psychological needs section and consists of social needs: necessity of affection as for relationship with family, friends and love; it implies the acceptance of others. The fourth floor, still under the psychological needs umbrella, is the esteem needs. Once an individual feels satisfied with its affection and belonging needs, this one can develop positive feelings towards himself/herself: self-esteem and self-worth are linked to achievement, recognition, respect and confidence. The last one called self-actualization is located at the highest level of the Maslow's pyramid and can be reached, according to him, only when an individual attains its full potential. Maslow describes this stage as self-fulfillment, personal growth, where someone *"desires to become everything that one is capable of becoming"* (Maslow 1943).

### 2.1.2 What is a Brand?

To make it clear, despite of all the definitions given on the internet such as “the brand is the emotional and psychological relationship between the company and its customers”, “a type of product manufactured by a particular company under a particular name”, etc., the brand, as a whole, is the personality of the business. Indeed, if you think of it as a personality, the meaning of it becomes clearer: the name, what it wears (the design), how it communicates (positioning), who the brand is associated with (target market) so on and so forth. This personality varies drastically from one company/business to another, according to the answer given to the criteria cited above. (Aaker 1991)

Above anything else, a brand is a name that influences buyers. Even though the name itself may not influence literally the purchase decision as a whole, the fact of having a good name, easy to remind of and with great connotation helps a whole lot. According to (Kapferer 2008), we live in an “attention economy”: consumers today are overwhelmed by the number of choices they face on a daily basis and they do not, cannot, invest their time into comparing and doing much research before making a call. However, even if there are exceptions such as collectors and others, and even so, they will never be a hundred percent sure that they made the right decision about the perfect product or service for them. Here is where we highlight the importance of a brand: this one must convey as simply, fast and clear as possible their potential consumers and have to make sure that brand awareness is well settled and understood in the market.

The key objective of a brand itself is to make sure that positive and exclusive meanings are gained in a vast range of consumer's mind to the point that this one becomes irreplaceable and hardly resistible. However, when we talk about brand loyalty, this one aims at growth and maintenance in the market through revenue generation in sales, market share and profitability for the firm (Aaker 1991; Kapferer 1995)

### 2.1.3 Brand Equity

The concept is called brand equity, in a more scientific way and according to the Oxford English Dictionary, means:

*“the commercial value that derives from consumer perception of the brand name of a particular product or service, rather than from the product or service itself”*

To make it simpler, there are some consumers, for example, who are willing to pay more for a can of Coke (Coca-Cola) over a store brand soda. Why is it important? Because the value of the product from the consumer's perception will lead to brand loyalty, which

is the ultimate goal of a brand. In other words, brand equity is the key to a company's profitability in the long-term. (June McDowell-Davis 2014)

Also, as mentioned above, when we talk about it in terms of personality, it is even simpler: the same way you get to know someone's personality occurs once you deal with them, it works the same way for brand equity, and this one also can change with time and other factors. Up until now marketers, in terms of tools and methods of marketing used, have tried countless variables such as events and sponsorships, the classical marketing mix, one-to-one marketing, internet and social media. (Kotler, Keller 2007)

Perception builds the meaning of a brand's product or brand itself during first impressions and is called, in marketing jargon, the consumer information processing. The four stages of perception in marketing are sensation, attention, interpretation and retention, regarding the consumer's recollection of the brand (Cross 2019). Here you can see the importance given to the consumer's perception and acceptance as this one can determine the purchase decision, establishing the unique relationship between the brand and the consumer, but also due to the difficulty to change.

This one also aims at building a balanced structure and allows to justify brand-building activities, being seen as the starting point in order to acquire brand loyalty. Once your measures are well set, companies will be able to fix the context and refine these measures in order to have a clearer starting point and convey the brand equity to the relevant markets, thus providing greater guidance (Aaker 1991).

This study will present 3 key-ideas of brand equity theories, presented by (Aaker 1996; Kapferer 1995; Keller 1993), being summed up as it follows by (Shrestha 2010):

- **Aaker (1991):** "Brand Equity is added value to firm and consumer"  
Components: **5 Dimensions of Brand Equity:** Brand loyalty, Brand name awareness, Brand associations, Perceived Quality and Other proprietary brand assets
- **Kapferer (1995):** "Brand has a duty to be faithful to its identity"  
Components: Physical features, Brand personality, Culture and Brand association
- **Keller (1993): CBBE Model:** Consumer-based Brand Equity: "differential effect of brand knowledge on consumer response to the marketing of the brand"  
Components: Brand awareness and Brand association.

Hereabove, the review concludes that the root model of brand equity comes from (Aaker 1991) and have inspired other scholars; will be the one that will be used in this research paper:

*"It is also noticed that most researches (Aaker 1991; Keller 1993; Cobb-walgren et al., 1995; Lasser et al., 1995; Yoo et al., 2000; Yoo & Donthun, 2001; and Lin & Chang, 2003) have been surveyed these four dimensions of customer based-brand equity (brand awareness, perceived quality, brand loyalty and brand associations) have suggested that they all have influence on consumer. Aaker's brand equity model (1991) is the mother of many following researchers' findings and results. The model has become the standard template for researchers such as Kapferer (1997) and Mela et al. (1997), yet their models are built upon similar factors that Aaker (1991) stresses. Consequently, it is felt that this model has been provided the whole spectra within the field of brand equity. Cobb-walgren et al. (1995) studies have used customer based perceptual measure of brand equity. Their study adopted Aaker (1991) conceptualization as adopted by Keller (1993) i.e. brand awareness, brand association and perceived quality." (Shrestha 2010)*

#### **2.1.4 Brand Loyalty**

Brand loyalty has been, for such a long time and still actually is the core theme when we talk about research for markets (example: (Benneth, Rudle-Thiele 2002; Chaudhuri, Holbrook 2001; Kapferer 2008; Oliver 1997). The concept of brand-loyalty can be seen as the ultimate relationship and identification with a brand (Kotler, Keller 2007).

If there would be a theoretical and technical definition applied to brand loyalty, one that would allow us to understand the perspective and measures of it, that would be the following:

*"Brand loyalty is defined as (a) the biased (i.e. nonrandom), (b) behavioral response (i.e. purchase), (c) expressed over time, (d) by some decision-making unit (e) with respect to one or more alternative brands out of a set of such brands, and (f) is a function of psychological (decision making, evaluative) processes." (Jacoby, Kyner 1973)*

Here we can distinguish quite clearly the two aspects of brand loyalty, being defined as behavioral and psychological. One of the measurements and most known aspects of behavioral loyalty is repeat purchase behavior, where the consumer repurchases constantly/frequently the products or services of the same brand after having experienced either.

This one is measured according to the frequency, number of times the consumer repurchases a give brand, in any given period of time. (Ordun 2015) In other words, behavioral loyalty is based on purchases from a single brand compared to the offer from multiple other brands. However, when we talk about psychological loyalty and

commitment from a customer, it happens when this one demonstrates and affirms a preference towards a brand and is able to cite the name of either whenever they are asked about their preferences. Still, in order to properly measure brand loyalty, it is essential to consider beyond these two measurement factors mentioned above as there are many other psychological variables that have been used as proper loyalty indicators, even more due to the changes in environment, behavior and technology nowadays:

*“Loyal behavior may include the frequency of visits, level of cross buying and the duration of the relationship while loyal mentality has been examined in terms of attitudes and preferences”.* (Söderlund 2006)

Even more, (Jacoby, Chestnut 1978) argued that consumers' commitment to a brand is considered to be an essential element of loyalty, as well as it allows to distinguish the difference between “real” loyalty and repeated purchasing whenever inactivity come in as a variable and may distort the difference between both (Pearson 1996). Brand loyalty or loyalty itself is a core aspect of brand equity because the core is connected to the brand you care about.

A loyal customer base, according to (Aaker 1996), is a basis for premium price, barrier to entry and time to respond to competitors' innovation in the market, in other words, of great importance because it helps businesses and brands to be evaluated based on their ability to influence them, the power of the brand itself. Also, brand loyalty is often signposted by the cumulative result of the use experiences, indicating the feedback/satisfaction levels of the customer.

As aforementioned, it is an emotional relationship built with the customer, on a personal level. The behavior of this consumer as well as his/hers decision-making process may be either conscious or unconscious.

However, this one is fully and always based on the customer's trust that this brand will live up to the expectations this one has towards it. Real brand-loyalists, whenever their favorite brand is not available or cannot be found easily, will not purchase a substitutive one, they will look into multiple shops and websites in order to find it and they demonstrate a solid involvement. The brand, through the consumer's lens, is seen as unique and bring up a unique feeling during the use and the purchase. (Gunelius 2010)

Brand loyalty and brand equity correlate the most when the value is perceived from brand loyalty, as it is an intangible value of the business success and may allow to do future performance predictions: indeed, you can always count on your loyal customers that will not hesitate to recommend you and spread word of mouth to their social circle about

your product. This is why brand loyalty should not be underestimated as it is extremely powerful, also in quantitative terms: it is well known that it costs more to acquire a new customer than investing on retention. (Gunelius 2010)

### 2.1.5 Brand Image

Heretofore, academics have not been able to find a common ground for the definition of brand image. Indeed, this have been thoroughly studied since the 20<sup>th</sup> century as this one is an empirical factor enabling to build brand equity. In theory, all products and services could be demonstrated *“by functional, symbolic or experimental elements, through which brand image is established”* (Zhang 2015). So, in order for companies to differentiate themselves in such a competitive market, they need to have a better comprehension on consumer behaviors, how to educate and help them building marketing strategies that are effective.

In a Journal Marketing article, (Keller 1993) brought up a concept called CBBE, “Customer-Based Brand Equity” in 1993. It points out various reactions from consumers who know the brand from a branding campaign/advertisement. In other words, brand image and brand awareness are the main sources of brand equity: if consumers have brand knowledge, the company may be able to invest less on brand extension and, at the same time, achieve higher sales goals. (Smith, Whan Park 1992)

Also, still according to (Keller 1993), by connecting the strong “brand association” with consumer’s memories about the brand itself through various campaigns, it could establish positive brand image in the consumer’s mind and the perception of it.

Within brand image literature, brand image is perceived as an important driving force for customer loyalty. (Zhang 2015)



## 2.2 The Apparel Industry

### 2.2.1 The history of the apparel/fashion industry

In order to allow you to have a smooth walk throughout this research paper, we must take a trip back in time to when it all started, up to the mid-century. As a whole, you may know the apparel industry as being the same as clothing, fashion and garment. It covers manufacturing, retailing, design and wholesaling of clothes, footwear and fashion accessories.

Even though clothing was considered as both art and necessity either to prove its place/status in society or as a survival need to endure the cold on medieval periods, today it covers way beyond these primary needs and criteria. Indeed, we should not forget that this sector also includes a lot of sub-categories, all linked to the desired appearance projected to society. Those can be modelling, hair styling, makeup, etc.

However, even though this paper may mention and consider some of these factors, we will focus on the main item and product of it, being the garment, as it is the most known one, visible, noticeable and communicative compared to the others.

The fashion industry itself consists mainly of 4 pillars:

*“The first one being the production of raw materials, more specifically fibers and textile but also leather and fur; Secondly, the production of fashion goods by designers, manufacturers, contractors and others; The third one being retail sales and finally, various forms of advertising and promotion”. (Mayor, Steele 2018)*

The four of them separate - but interdependent sectors of the industry - share the same goal at the end of the day, being to answer to the consumer demand and generate profit.

Most of clothing are made from textiles, as the most used and known raw materials can be defined as following, according to Britannica.com: wool, cotton and other natural fibers being one of the first Industrial Revolution's accomplishments, going back to the 18<sup>th</sup> century. Even though the fashion industry is a product born during the modern age, we must know that all clothing was previously handmade for individuals, by tailors and dressmakers then later home production, and this went on for most of the human history. (Mayor, Steele 2018)

At the beginning of the 20<sup>th</sup> century, following the creation of sewing machines (considered as a new technology in this industry), the rise of a global capitalism as well as the development of the production system of factories, including department stores,

clothing became a mass-produced merchandise in standardized sizes and sold at fixed prices. Whereas it was first developed in Europe and America, today's apparel industry is strongly globalized and internationalized. Indeed, if salaried fashion designers must be mentioned, 40 percent of them are employed in New York City according to (*Fashion and Apparel* 2016).

By globalization, we mean that clothing, nowadays, is often designed in one specific country (let's take France as an example), then manufactured in another one (Bangladesh) and finally, shipped and sold in a third place (United States) to retail stores and outlets. As per today, even though the textile sector is fully automated in its production, garments are still sewed and grouped together, either on sewing machines or handcrafted (Monet 2017).

However, with the new business model of production in the sector, this use of materials since the 18<sup>th</sup> changed a bit. Nowadays, both natural fibers (such as silk and linen) and synthetic fibers (polyester, acrylic and nylon) are combined to constitute the clothes we wear (Mayor, Steele 2018).

According to the group IBISWorld, it has been reported that in 2015, the global apparel manufacturing industry generated an approximate revenue of 618 billion dollars (*Fashion and Apparel* 2016). The fashion industry suffered in terms of its own image whenever they faced scandals regarding labor management, however, just taking into account the manufacturing sector in the United States, the apparel industry employed in 2014, as stated by the Department of Labor, around 142,860 workers. As we can see, the apparel industry is a key targeted sector for trade, employment, investments and revenue worldwide. However, there is another type of business in the fashion industry, one that does not come either from the traditional model, neither faced the transition to globalization.

This category is what we call marketers. Those are manufacturers without factories that were literally born global. A few examples of these that are well known: Nike and Reebok (Gereffi 2001). They adopted a supply chain model and developed their own global sourcing network, allowing them to use a better trained workforce and by doing so, thus splitting the production from the design and marketing steps of the value chain in order to better face and deal with the new competition flows. (Gereffi 2018)

Now, before heading any further into modern trends and linking the fashion industry with the generation on which we will focus in this paper - the Millennials – let's highlight the importance, both in history and in modern matters of the high-end/luxury fashion.

### 2.2.2 Luxury Fashion

There are key periods, circumstance and events that led to the evolution of modern luxury branding as known today; such as following the industrial revolution, it incurred the prêt-à-porter fashion (ready-to-wear) due to mass production techniques developed at that time. Also, the dissolution of monarchies and social class systems led to an innovation wage after the First World War, showcasing a certain social evolution and the link between human and fashion histories. (Okonkwo 2007)

Previously, as mentioned above, the clothing sector was mainly led by tailors and very few retailers. However, whenever we mention the design section of it, a very small number of designers have become famous with their names alone. Few of them are well-known, such as Coco Chanel or Calvin Klein (Mayor, Steele 2018), who have created prestigious collections either in terms of couture or ready-to-wear fashion clothing.

Why do we insist on this matter? Well, not because of the price nor the historical prestige of it, but mainly for the major influence these designers. They have settled and launched massive trends that are still followed and revisited nowadays, even though most designers team up working in anonymously for manufacturers in order to answer to the consumer demand.

There are, indeed, hidden and anonymous artists who sketch, draw and project it onto mannequins, but mostly - not to say only- a few numbers of them work in the haute couture, usually in Paris. In regards to the other sections of the luxury clothing designers, the major part of their basic skills are today replaced by computer-assisted techniques, allowing them to rapidly make changes in alignment to the global demand, as they work for companies that produce on the other side of the globe. (Mayor, Steele 2018)

In the late 19<sup>th</sup> century, fashion designers and producers used to promote their pieces to media, more specifically fashion journalists, to retailers and directly to clients. Even at that time, a few couture houses used to offer their customers private and “Avant-première” viewing of their latest fashions and trends to come. Even though it all started in Paris, this trend spread quite quickly, as being successful and acclaimed, in other countries.

In the late 20<sup>th</sup> century, fashion shows became more elaborate and theatrical, when catwalks were born to elevate runways for the models who became the main attraction of the fashion events.

By the early 21<sup>st</sup>, during spring and fall, ready-to-wear fashion shows were held. The worldwide known “Fashion Weeks”, the most important ones taking place in Paris, Milan, New York and London, but these events are now a dime a dozen in the globe, spread out through the Asian and South American continents, where they lead and show the future of fashion trends and how it may change (Mayor, Steele 2018).

### 2.2.3 Fashion Trends

Before going deep-down into the fashion trends that have cross-generationally effect, let's head into a small presentation of the fast-fashion and the factors around it.

As any excessive and addictive behavior is considered as being able to turn into destructive and dangerous ones, this behavior phenomenon is noticeable in the fashion industry, mostly in Europe and America since a few years back. Indeed, mass clothing production companies are led by profit maximization, enhancing quite a lot of negative aspects due to the thirst of market share and the power of companies and consumers. (*Consumer behavior, fast fashion and sustainability* 2018)

But before heading in detail into the consequences of it, let's first explain in a broader picture what are fashion trends. As presented before through the fashion history, what essentially determines a fast fashion retailer is when the production process is accelerated in order to get the newest catwalk trends distributed either online or to the stores, as fast as possible.

This effect is also being seen in the food industry means that, instead of waiting for the natural cycle to keep leading and waiting for the new seasonal collections, fast fashion allows customers to obtain all year-around trendy clothing, in all its forms. (Gilliland 2019) This shift in business model in the industry has been and still is caused by the consolidation of businesses, more specifically in the retail sector, the technology improvement, which may decrease the need for clothing manufacturing workers in terms of employment influence, the use of e-commerce and the continued use of cheap labor in countries such as China. (*Fashion and Apparel* 2016)

The best example of one of the leading companies in fast fashion is Zara (Rudolph 2018), as mentioned on the cited article, the following:

“The brand has seen enormous success thanks to three key elements (Roll 2018):

1. **Short lead times.** This keeps its range up-to-date with current trends.

2. **Limited supply.** Zara sells less of each item, but there is always a new item waiting to be released.
3. **More styles available.** Rather than selling more of each individual style, it constantly brings out new ranges. As in more than twice a week!

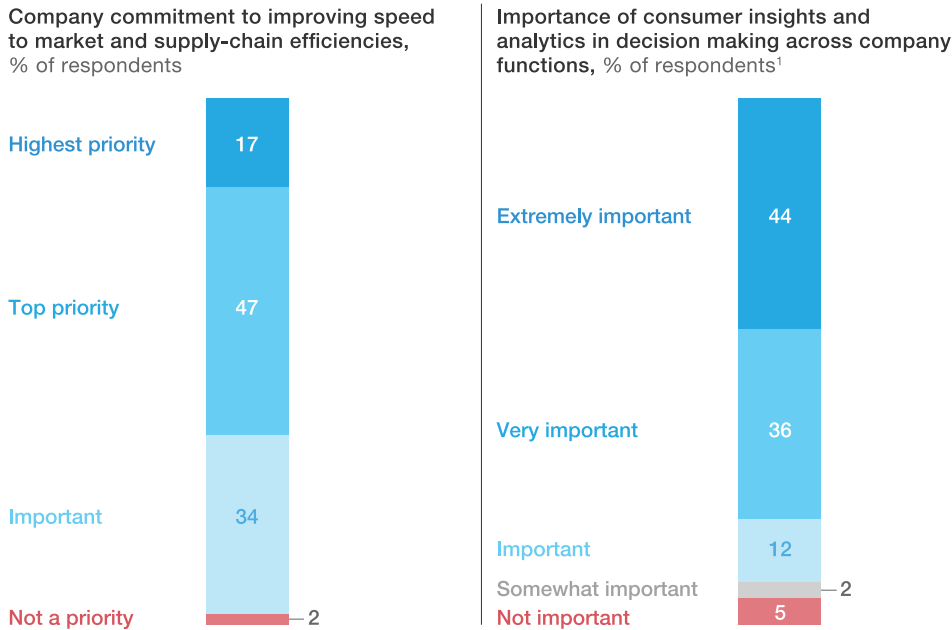
The result is a clothing range that's adaptable, always fresh, and allows for buyers to have "unique" looks despite being a mass-market retailer.

The chain **relies on** feedback from all stores: "Store managers communicate customer feedback on what shoppers like, what they dislike, and what they're looking for. That demand and forecasting data is instantly funneled back to Zara's designers, who begin sketching on the spot." (Chan 2018)

And this is not only applicable to Zara, as shown in the picture below; most fashion brands are aware of their need for improvement in terms of speed for market efficiency, as well as how important it is to incorporate consumer behavior in their decision-making processes (Hunter, Marchessou, Schmidt 2018):

**Figure 2 – Awareness and Priority Degree of Companies**

Companies are trying to adapt.



<sup>1</sup>Figures may not sum to 100%, because of rounding.

Source: Expert interviews; press search; *Women's Wear Daily* C-suite speed to market and consumer insights survey (n = 59)

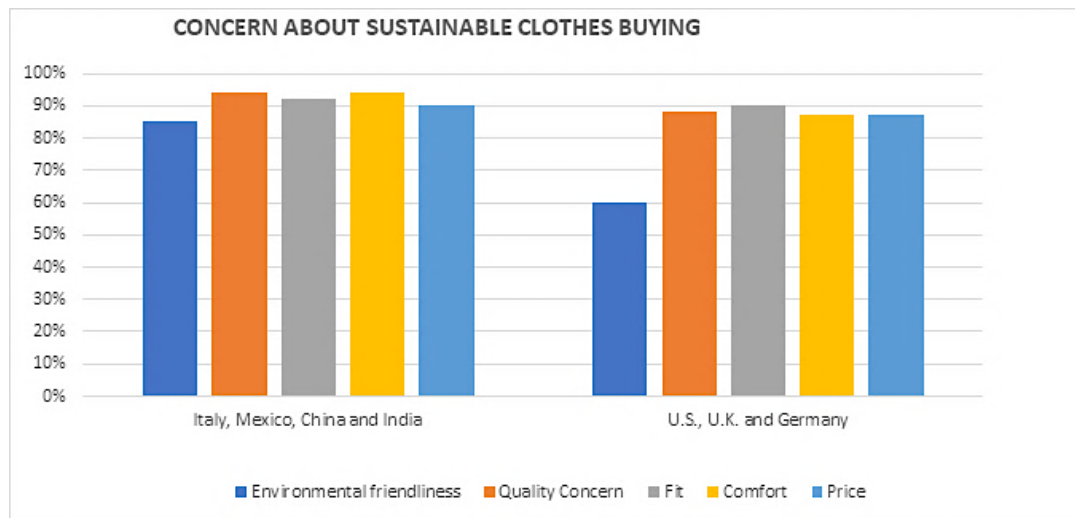
McKinsey&Company

However, even though fast fashion is at its peak, there are several consequences from it that shifted consumer insights and new generations, in terms of career prospection and consumption. For the fulfillment of consumer demands, fashion designers are constantly working under pressure and end up losing creativity, as people tend to spend a large amount in clothing in a weekly and monthly basis. The report from McKinsey & Company titled “Sustainability and Resource Productivity” in October 2016 illustrated that the number of garments produced annually doubled since 2000 and exceeded for the first time 100 billion pieces in 2014. In other words, nearly 14 new apparel items for every person on Earth. (*Consumer behavior, fast fashion and sustainability* 2018)

However, the modern trend that implemented itself majorly for the young generations is the eco-friendly and sustainable one, leading into a shift in business models and end of second-hand clothing. This trend also highlighted the waste generated by mass companies in regard to water and other raw materials as well as the fact that those have been incinerating and discarding the unsold items. As consumer awareness for sustainable clothing and products keeps increasing in a daily basis, researches have shown also that only 55% of consumers diminished their goods consumption (quantity)

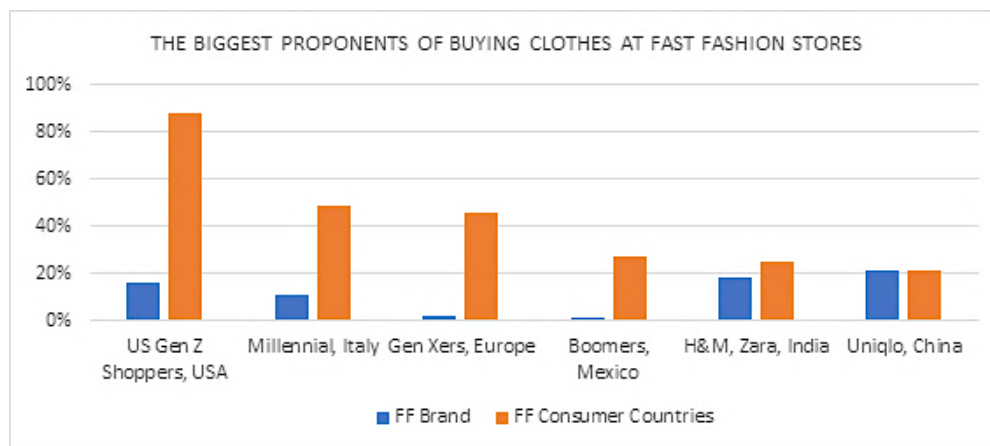
and 65% use recycled as part of their eco-friendly practices and habits in the United States.(Consumer behavior, fast fashion and sustainability 2018)

**Figure 3 – Factors affecting consumer behavior in different countries**



Source: Cotton Council International & Cotton Incorporated Global Environment Research

**Figure 4 – Market Leader in Fast Fashion (FF): Brands & Market Share of Fast Fashion in the corresponding country**



Source: Cotton Council International & Cotton Incorporated Global Environment Research

As a conclusion, we can say that despite the beautiful initiative for sustainable and eco-friendly trends in fashion, the latter is becoming slowly an issue as the use of natural fibers in clothing keeps increasing and plays a key role in developing and main producers countries for this market; it might lead either to a slow-down in these economies that may depend or for whom it may represents a large slice of the cake in terms of lead in the industry, as well as an increase in unemployment and poverty. The fashion industry must find the right balance in order to maintain the wealth of workers, countries themselves

but also to reduce the consumption and somehow prevent them about this matter and find solutions. (*Consumer behavior, fast fashion and sustainability* 2018)

#### **2.2.4 Do clothes speak?**

As for today, fashion is society's symbol that has been and still is influenced by changes in history, traditions, religions, economics, psychology, politics and, more recently, technology. These aspects of evolution have become highly appealing thanks to effective modern techniques, while keeping its roots down in the traditions and an eye on the history of each house. Indeed, houses such as Louis Vuitton, Gucci and Guerlain, French and Italian houses, have a long history and, aligning it to their countries and their origins, they play a key role in the global fashion development, being seen as traditionalists and experts. (Okonkwo 2007)

Fred Davis in his book "Fashion, Culture and Identity" (Davis 1992), he analyses and mentions several justifications and researches regarding the clothing communication. One of the references he has made in his book is on the meanings shared within the clothing community and how clearly it happens, both in people's minds and the society's dictating it. One of them would be the associative connections, studied by Sahlins in 1976, such as the statement that clothes with formal design elements state that anything considered as "angular" (with sharp corners, V-shaped for example) are seen as more masculine, whereas anything being seen as curvilinear, more rounded, is perceived as more feminine. Also, there are other characteristics and associative linkages that can refer to clothing meanings, such as colors and tones. For example, dark tones are considered and used for more formal, serious and business occasions and lighter tones are identified as more informal and casual.

In other words, clothes can speak even though there is no formal, written rule about it and this whole sociological and anthropological concept is here to show us the ambiguity of the apparel as a whole and how it can communicate. Indeed, (Enninger 1985) highlights three main concepts and features of the clothing code (even though there exists much more than three). The main pillars known amongst all are H&M and ZARA, being considered as the first natives of fast fashion retailers.

The first one is called the "Context-dependent", saying that the meaning of the style depends tremendously upon the identity of the wearer, the place, the company or the occasion. For example, that one floral piece will fit very nicely at an outdoor barbecue party but will connote differently when this one is worn at work, even badly according to a certain country's culture and customs.



The second one is “High Social Variability in the Signifier-Signified Relationship”. While these consist an appearance, trend of style and be at first sensed to be seen as the same for everyone, the interpretation of it differs from one social group to another. From a conservative stance up to a fashion-freak standpoint and for creators to its customers, the meanings and attachment to clothing, hairstyles, cosmetics, jewelry and other accessories differ in terms of importance and perceptions of it, in terms of taste, interest and symbolism (Gans 1974). An example of it would be the masculine-military styles in the mid 80s that were fashionable among the feminine audience. The interpretations that came from that trend were symbolically dominant as an appropriation of the masculine authority, as a gender-inverted parody, and fashion-conscious socialites, as an affront from women against this masculine power image.

The third one is defined as “Undercoding”. This one applies broadly, except for uniforms that already have their own identity. (Joseph 1986), endorses that clothing styles can prompt different responses from different social groups in terms of features and clothing codes and insists on how it is important the way meanings are communicated. By that, it is said that beyond the fashion coding, there is much more information sent than speech, writing, figures and symbols being conveyed by clothing as well as the interpretation of it. By all means, instead of talking about the interpretation of a skull printed on a shirt depending on religions and culture statements, we are talking about the subtle expression of it being fully linked to the person wearing it, where we can almost distinct emotions/messages through it. An example would be given by Gisele d’Assailly (d’Assailly 1968), where she reports that “*Marie Antoinette and her entourage would often refer to items of dress in such metaphors like: “a dress of stifled sighs covered with superfluous regrets”*” (Davis 1992)

The reason of going through these social concepts would be to allow readers to understand the importance of the subtle communication that comes with the fashion movement and to associate it and better analyze the consumer behavior characteristics amongst generations and, more precisely the Millennials (Gen Y), as presented below.

### **2.2.1 Apparel Industry and Brand-Loyalty: what do they have in common?**

The link between this industry and marketing metric would be the idea that social identity can be used as a variable, while it explains and justifies the involvement of customers in the apparel/fashion, both regarding their own insights and also their surrounding’s reaction to their change (Pineiro 2008). Also, researches take into consideration that

clothing is used as an opportunity for individuals to express and communicate their new identity (Ries, Hein, Pihu, Armenta 2012), by explaining that clothing itself is seen and interpreted as a linguistic code, as mentioned in the section “Do Clothes Speak” above. Also, it has been indicated by (Stets, Burke 2000) that self-identity could be a great tool in order to predict people’s intentions as they have a tendency to align their acts with their own standards and values. (Valaei 2019)

(Chan and Wong 2012) clarified this concept in the fashion industry by providing the following example, aligning it to the “*optimal distinctiveness theory*” stressing the need of belonging and acceptance in a community. They may buy from the same brand but select different colors in order to indicate to whom they belong, but still show their need to distinct themselves. Also, it has been claimed by (Eastman, Iyer, Thomas 2013) that most of the customers will purchase and use specific products as a way to value their self-esteem and to present who they are to others in a similar way that they see and value themselves.

Even though millennials have a strong desire of belonging but at the same time, a strong need to distinct themselves and demonstrate how unique they are, the fashion trends and style assist this generation to obtain social acceptance by their peers (Fernandez 2009). Indeed, this generation is very fashionable and enjoys being updated in terms of apparel and trends, as well as being seen as fashionable. (Hassanzadeh, Namdar 2018)

Finally, it has been shown that there is a correlation between the country of origin and their attitude, purchase decision towards the apparel industry. Indeed, despite of their usual surroundings (colleagues, friends), millennials have a strong desire to be accepted for their conventions and may be influenced by these standards in order to fit fully within the society, including their family and other communities. (Labrecque, Krishen, Grzeskowiak 2012)

In order to sum up, the relationship between the apparel industry and brand loyalty is the emblem around it of self-identity, recognition and social acceptance. They need to symbolize and to communicate themselves towards style, as we talk about tangible goods, aligning with their personality, beliefs, values and attitudes (Dittmar, Beattie, Friese S. 1996). Moreover, today’s society is more materialistic than never, even though the social status is not as strong as before in terms of demonstrating it and materializing it, the fact of living in a such wave where technology and first impressions are ruling, clothing is, today, more than connected to people’s identity. (Valaei 2019)

## 2.3 Millennials

### 2.3.1 Who are they?

Millennials, also known as “Generation Y (Why)”, were generally born between 1980 and 2000 (K. Miller 2014), even though there still is no general consensus with regards to the birth timeframe, as other definitions of the time interval are shown. This research will be based on the frame announced above in order to give a proper overview and analysis through comparing this distortional generation to the other ones.

As millennials have a patchwork of conflicting expectations and very contrasting profiles, it is quite difficult to understand and keep them. Indeed, there are different types of millennials’ customers:

*“there are those who buy to be seen, to belong to a clan. There are those who capitalize on their image. And there are those who sincerely love clothes.” (Kiner 2017).*

Millennials as well as most of the generations use the apparel, fashion and social media triangle in order to express who they are and to show how they differentiate themselves amongst others, as the first impression matters the most. However, before starting to analyze millennials, this research would like to highlight some marketers’ principles, being the following:

*“A review of the popular literature suggests that the millennials “want it all” and “want it now,” in terms of good pay and benefits, rapid advancement, work/life balance, interesting and challenging work, and making a contribution to society” (Ordun 2015; Schweitzer, Lyons 2010)*

WJSchorer Company (K. Miller 2014), this one provides an assessment of the various generations. The one regarding millennials is the following: they are the largest generational cohort since the Baby Boomers.

*“They are known as extremely sophisticated people, technology savvy, immune to most traditional marketing and sales pitches/techniques, since they grew up with it and have been exposed to it since their early childhood”.*

Still according to WJSchorer, they are less brand loyal due to the speed of the Internet and access to information: it led them to be flexible and changing in this generation’s fashion, style consciousness and where/how they communicate through it.

Also, Gen Y members are more racially and ethnically diverse, as well as more segmented as audience. In 2013, they were aged between 13 and 33 years old, representing 30.3% of the population in the United States.

*“Today’s teens and young adults are quite the multi-cultural bunch. The 12-to-17, 18-to-24 and 25-to-34 groups are almost identically multicultural, as 42% of each comprises Hispanics, African-Americans, and Asian-Americans. This is only the tip of the iceberg – U.S. Census data shows that African-Americans, Asian-Americans, and Hispanics will generate the vast majority of the U.S. population growth over the next few decades.”* (Nielsen 2013)

While millennials are trusting of certain authority, they are skeptical of advertising that is targeted to them (Kapner 1997). Because millennials value products for their necessity to their lives, they dislike advertising because it often causes them to buy things they do not need. Millennials question the truth in advertising and believe marketing to be misleading. (Lodes 2009)

### 2.3.2 Millennials VS Other Generations

**Figure 5 – Generational Demographics**

According to (K. Miller 2014), marketers generally organize consumer segments into five distinct generations, being:

	Year of Birth	Age (in 2013)	Population
• Seniors:	1945 and prior	68 and older	36 million
• Baby Boomers:	1946-1964	49-to-67	76 million
• Generation X:	1965-1979	34-to-48	61 million
• Millennials (Gen Y):	1980-2000	13-to-33	93 million
• Generation Z:	2001-present	12 and younger	53 million

Here above, you can see the results from the research led by WJS, highlighting the size and importance of this cohort in amount compared to other generations, being one of the reasons why businesses and the economy as a whole are so fascinated and so savvy to understand and acquire this generation’s attention.

**Figure 6 – Generation’s Unique Characteristics**

### **51.1 Unique Characteristics**

A recent survey by The Pew Research Center ([www.pewresearch.org](http://www.pewresearch.org)) asked people of all ages what makes their generation unique. Responses were as follows (percentage of respondents):

#### **Seniors**

- Experienced World War II: 14%
- Experienced the Great Depression: 14%
- Smarter: 13%
- Honest: 12%
- Work ethic: 10%
- Values/morals: 10%

#### **Baby Boomers**

- Work ethic: 17%
- Respectful: 14%
- Values/morals: 8%
- Largest generation: 6%
- Smarter: 5%

#### **Generation X**

- Technology: 12%
- Work ethic: 11%
- Conservative/traditional: 7%
- Smarter: 6%
- Respectful: 5%

#### **Millennials**

- Technology: 24%
- Music and pop culture: 11%
- Liberal/tolerant: 7%
- Smarter: 6%
- Clothes: 5%

Here above find demonstrated the criteria chosen by a surveyed public that demonstrates in how each generation considers itself (and not by others) as unique. In terms of millennials, the two main and surprising (for the second) criteria that are announced are technology and music. Clothes come at the 5<sup>th</sup> place, with 5% (out of 53%) as important, descriptive of the Gen Y. Here, what is quite interesting is to notice that they consider themselves as smart and/or more liberal/tolerant compared to other generations. Can we state that they are more self-reflective? We would be able to know so only if we understand to what context they reflect themselves and apply these criteria: Racism? Human rights? Socialism? (K. Miller 2014). The main objective of assessing generational time-frames is to determine the behavior and lifestyle influences according to the era in which the consumers lived and how the main events on each era impacted their influences, tastes and spending.

### 2.3.1 Millennials, Brand Loyalty and Apparel Industry

With regards to their attitudes towards the apparel industry, it has been demonstrated by the Urban Land Institute, how millennial express their feelings toward shopping:

**Figure 7 – Millennials' Shopping Attitudes**

#### **55.5 Shopping Attitudes**

In a May 2013 study by the Urban Land Institute, Millennials expressed their attitude toward shopping as follows:

	Female	Male
• Love to shop:	44%	29%
• Shop when necessary and enjoy it:	45%	51%
• Shopping is a necessary chore; I can deal with it:	9%	15%
• Hate shopping:	3%	5%

There, with no surprise, the majority in “Love to shop” are women, not men. However, what we can see with this figure is that this data demonstrates the spontaneity of women during their shopping time, as 51% of men answered that they shop whenever they need to do so but still enjoy doing it. There is a huge potential that maybe is still not well explored by companies toward the male millennials.

Finally, this generation differs the most whenever we talk about factors that influence their selection of a brand when purchasing. The factor that has been ranked as the first one is the price and, hereunder, shows the other factors taken into consideration by them, according to IRI:

In a survey of millennials (ages 18-to-34) by IRI ([www.iriworldwide.com](http://www.iriworldwide.com)), item price ranked as the #1 influencer of brand selection, ahead of previous usage and trust of brands, shopper loyalty cards, and advertising. Eighty-seven percent (87%) of survey respondents said price was among the two top influencers.

Even though these factors do not apply to all millennials and all shopping habits, it is quite interesting to see how profiles and shopping habits may differ from one young person to another. There are factors that may seem not well developed enough such as advertising: As mentioned already, this generation is considered to be immune to traditional advertisement and traditional marketing methods (such as loyalty cards, etc.). However, this one may vary according to the type of advertising (Social media? Television?) as well as the type of loyalty card: which brand do they think about and what type of product? Do the loyalty cards work with millennials only when the trust of these are gained? (K. Miller 2014)

## **2.4 Conclusion of the Literature Review**

The most important findings of this research are that the Generation Y still is not clearly defined, understood and standardized by experts in the business field, due to its divergence in shopping habits and identity, without forgetting the technological and internet variable, which appears in the equation and was not present in the previous generations' one.

Also, this research discovered that there are different perceptions, definitions and theories in terms of brand-loyalty framework. Indeed, researchers (Aaker 1991; Jacoby, Kyner 1973; Kapferer 1995; Kotler, Keller 2007; Pearson 1996) argue on the importance and the dominance of each metric used to measure brand loyalty, as well as which one depends on the other, is the outcome of it. In other words, brand loyalty is a difficult concept to be measured and to obtain a clear picture of the evaluation of either. Also, the paper demonstrated that there is much more communication, even though intangible and not direct, being expressed through clothing and styling. There is an empirical correlation between the fashion industry, anthropology as well as brand loyalty and brand equity. What this research did not discover is first, if millennials are or are not brand loyal in the apparel industry, as well if there is a solid connection and value perception in general from millennials towards brands in this industry. The research also did not discover if there is a "new concept" of brand loyalty that can be applied to this generation.

Therefore, in order to answer these gaps, a primary data collection will be led, consisting of experts' interviews and focus groups. Indeed, the objective of this collection will be to contrast and apply the theories in terms of brand equity, brand loyalty as well as self-reflection with the Gen Y themselves and try to understand what is going on in their minds. But also, by screening the research's pillars along with the experts, we would like

to know to which degree these theories speculated by the researchers are applied on people's daily lives and if they are useful or not to answer to this question. Or, on the other hand, the experts will tell us according to their experiences, what should actually be done by companies and how it should be applied in order to obtain more relevant results and positive reactions with this generation. Moreover, the research aims to question experts who actually are "early millennials", maybe allowing us to discover that there are less barriers being faced to work with this generation in terms of understanding, tools and adaptation.



## 3. Analysis

### 3.1 Research Methodology

The goal of this research is, at first, to try to answer to the main question: “Are millennials brand loyal in the apparel industry?”. Instead of measuring the brand loyalty of such a special generation (*Who are the “Millennials” and why are they a unique generation?* 2015), as most of the studies done so far (by Deloitte, WJSchorer Company and others mentioned hereabove), the main point of it is to understand what is going on in their minds and how do they actually reflect towards themselves, how much importance do they give to their appearance as well as towards brands. In order to do so, this research focused on two types of interview in order to base itself on a qualitative analysis with 19 millennials (amongst which there are 8 boys and 11 girls) and 4 experts:

The first wave of interviews will be with professionals specialized in branding, consumer insights and millennials, having either worked with the topics mentioned (directly or indirectly), studied them through their master and PhD researches or teach them as teachers. There will be 4 intervenors, who are interestingly all part of the early millennial generation, who will be interviewed individually throughout the research about the main sections of this paper: millennials as a whole, their relationship with brands, their purchasing behavior, brand loyalty, how and by whom they are influenced and digital attitudes. The Interview questions will appear in the **Appendix Q1 & Q2**, at the end of the document, both in French and English. The objective of these interviews would be to validate/redefine some concepts mentioned in the literature as well as, more importantly, obtaining some professional advice regarding millennials’ brand loyalty and attitudes, as well as comparing it to the second section of the data collection. The experts’ profiles are as following:

**Anouk Bergner:** Studied at Princeton University, U.S: and was enrolled in London, master’s degree in behavioral economics. 9 years of experience in the consumer insights field as an internal consultant, doing market researches and strategic branding: started in 2008 at Procter & Gamble (P&G) then went through the transition when some of their brands have been bought by Coty in 2015. She started with feminine hygiene products (Always, Tampax, ...), then joined a specialized group for retail behavior (*how people shop, navigate into shops, etc.*) then Gillette, then in the fragrances field with Coty and finally for Wella professional (hair care brand). She is currently a research associate and PhD candidate in marketing analytics in St-Gallen.

**Arash Golnam:** “I am a millennial and I work with millennials, more recently with Gen Z students”: He has been working in the teaching sector for 18 years, also a professor in 4 universities, both in Geneva and Lausanne in the fields of systemic and strategic thinking, Management Information systems (MIS), operations management and information analysis, in general. More recently, he started creating a project on millennials which consists of changing the education system in order to meet both educators and millennials generation’s needs in terms of learning and teaching methodologies, class structures, evaluation techniques, so on and so forth.

**François-Xavier Marquaire:** He studied at a business school in France, specializing himself in marketing and management. He has accumulated several internship experiences in investment banking and luxury marketing. His early career was oriented towards luxury marketing, then in spirituous wines in operational marketing and in hotels for major brands such as LVMH and L'Oréal. Incidentally, he worked as a sommelier and, after several years of experience in marketing, he decided to set up his own consulting company. He has worked with more diversified clients such as startups and industrial companies. He left for Italy two years ago with a local consulting firm, with a fairly diversified client portfolio. He has now been working for one year at Creative Supply, a consulting agency specialized in branding and brand strategies based in Zurich, which he joined definitively at the beginning of 2019.

**Tiffany Baer:** Master's degree in emotional and applied psychology, specialist (PhD) in luxury consumer behavior, she is a trainer and consultant for marketing managers, designers and/or company directors, in this field since approximately 5 years. She accumulated several consulting experiences throughout her collaborations, during both her master and PhD researches as well as a teaching assistant, where she had the opportunity to meet a very broad, interesting and diversified network. In addition to her consumer insights advices to companies, Tiffany is currently looking for new opportunities and challenges in her particular field.

All of the experts have been found on LinkedIn and by word of mouth (advisor suggestion for Ms. Anouk Bergner). The second wave of interviews will not be individual like the first wave. These interviews will happen under the form of focus groups of millennials themselves. There will be between 2 and 3 sessions of approximately 1-2 hours of discussion with groups of 5-10 people. The objective is to analyze and observe during the grouped semi-structured interview the reactions, point of view, eventual debates and behavior of the speakers:

*“Semi-structured interviews consist of several key questions that help to define the areas to be explored, but also allows the interviewer or interviewee to diverge in order to pursue an idea or response in more detail.” (Gill, Stewart, Treasure, Chadwick 2008)*

The millennials are chosen by the following criteria: age, personalities, style and ethnicities.

The aim would be to see as well how influenced or biased can some of them react according to the answers given during the whole process, into which subject they may last/debate the most. There will be some questions that will be asked as a “guideline” and some uncovered/unprepared/unmentioned topics that may cause even more debates. Again, the point would be to observe the divergences and importance given by them.

The design of both questionnaires is, as said above, aiming to cover the three main topics of the research, being: millennials, apparel industry and brand loyalty. Before any interview starts, a small “information” questionnaire was required to be filled in order to obtain and compare the demographics of all participants and to allow this paper to link some answers and reactions to other demographics criteria of the people that are being questioned. As there will be no surveys but open questions, the point of it is to give opportunity to the intervenors to get themselves deep into the topic and to lead to new hypotheses or unexplored subjects and matters.

Once both types of interviews are completed, there will be a sum-up and description of the participants given in the project (for the millennials) but no full transcription of the discussion. The professionals’ interviews, on the other hand, will be fully transcript and included in the appendices.

Throughout the analysis, the research will highlight the similarities and differences between the two interviews and lead to concrete and solid recommendations.

## 3.2 Results

### 3.2.1 Experts Interviews Results

**Table 1 – Experts Interviews Results (Summarized)**

<b>THEMES</b>	<b>TOTAL</b> (x mentioned)	<b>EXPERTS</b> (agree/mentioned it)
Millennials privilege and seek for experience more than ownership	16 times	Anouk B., Arash G., François-Xavier M., Tiffany B.
There is a behavioral change from this generation	12 times	Anouk B., François-Xavier M., Tiffany B.
Millennials are more similar than different compared to other generations	11 times	Anouk B., Arash G., Tiffany B.
The best way to access to Millennials is through digital and social media	11 times	Anouk B., Arash G., François-Xavier M., Tiffany B.
Value perception & Brand community is key for Millennials	11 times	Anouk B., Arash G., François-Xavier M., Tiffany B.
Constant and meaningful communication is key to acquire Millennials	11 times	Anouk B., Arash G., François-Xavier M., Tiffany B.
Millennials are influenced by social media ambassadors (influencers)	11 times	Anouk B., François-Xavier M., Tiffany B.
Millennials are more conscious and favor transparency	9 times	Anouk B., François-Xavier M., Tiffany B.
Millennials shouldn't be categorized	7 times	Anouk B., Arash G., Tiffany B.
Millennials adapt themselves more than other generations	7 times	Anouk B., Arash G., Tiffany B.
Millennials tend to reconsider the system in which they live	6 times	Anouk B., Arash G., Tiffany B.
Marketing itself has changed	5 times	Anouk B., François-Xavier M., Tiffany B.
The way businesses do has changed	5 times	Anouk B., Arash G., Tiffany B.
There is a will to buy less but better (Quality, expectations and provenance)	5 times	Anouk B., François-Xavier M., Tiffany B.
Millennials are influenced by their peers and surrounding	4 times	François-Xavier M., Tiffany B.
Brands are losing their identity by trying to adapting too much to all the dynamics of the market	4 times	François-Xavier M., Tiffany B.
Millennials want to make an impact and leave something behind	4 times	Anouk B., Arash G., Tiffany B.
Millennials are a practical generation	3 times	Arash G., Tiffany B.
Millennials are more brand-loyal	3 times	Arash G., Tiffany B.
It is easy to work with Millennials (as a target)	3 times	François-Xavier M.
Millennials are less brand-loyal	1 times	Anouk B.

We can find on the previous page a summary of the results given by the experts. This table is effectuated as follows:

The interviews were extremely rich in terms of information, data and objective point of view according to the expertise of each one of them. The best methodology to adopt, which is the one used in the frame of this research, was to compare which matters and answers were commonly answered by all of them and how many times, in order to prove the realism of the statement made as well as being able to sort most of the answers, treat and develop the ones that are the most relevant scientifically.

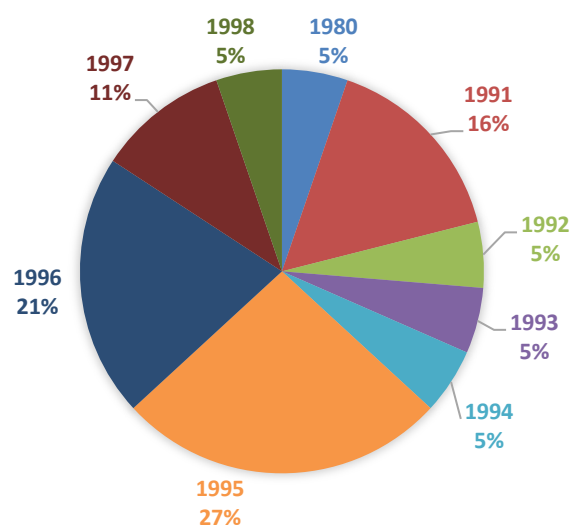
However, this table is not reflective at a 100% because, due to lack of time allowance or due to the proficiency of the experts, there are two interviews which we have been forced to split the questionnaire into two. Luckily, the two questionnaires, even split into two, are complementary as the two experts in question, both M. Arash Golnam and M. François-Xavier Marquaire answered to a different half part of it, each. Thus, according to the **Appendix Q1**, the questions to which M. Golnam did not answer are questions 8-9, 10 partially, 11-12 and 15-16. Regarding M. Marquaire, the questions he has not been able to answer to are questions 1 to 6.

### 3.2.2 Focus Groups Results

With regards to the Focus Groups, the summary of the overall results hereunder will highlight the topics for which both, separately and put together, the millennials agree on. You can also find a more detailed table as well as further information about the Focus Groups in the Appendixes as well:

**Table 2 – Focus Groups Profiles (Demographics)**

Names	Gender	Birth Year	City
Alessandra	F	1995	Geneva
Arnaud	M	1995	Geneva
Béatriz	F	1996	Geneva
Brigitte	F	1991	Bienne
Cécile	F	1997	Nice
Darwich	M	1993	Ornex
Dhony	M	1996	Geneva
Elisa	F	1995	Geneva
Evana	F	1996	Geneva
Fabrizio	M	1997	Geneva
Guillaume	M	1994	Geneva
Ivan	M	1991	Geneva
Joëlle	F	1995	Gland
Marc	M	1980	Geneva
Marilia	F	1995	Geneva
Mélanie	F	1992	Geneva
Nicolas	M	1991	Geneva
Sarah	F	1998	Geneva
Sheba	F	1996	Geneva



### 3.2.2.1 Focus Groups Profiles

#### Focus Group 1:

Cécile, Darwich, Elisa, Guillaume, Ivan, Joëlle, Marc and Nicolas.

- This group is made only of students from the Business School of Geneva (HEG).
- The average age of the group is 27 years old (1992) and the median age is 25,5 years old (1993,5).
- 5/8 live in Geneva, 2 in France and 1 in Vaud. In terms of origins and ethnicities, the group is quite diversified.
- Marc is the eldest and the earliest “millennial” of this focus group, born in 1980. The research found interesting to include him in the primary research due to his background, interesting point of view as well as he works, studies and spends most of his time surrounded by millennials.
- Cécile is an Erasmus student from Nice, who spent two semesters in Geneva.
- 6/8 are enrolled in the full-time program and 2/8 in the part-time program and 4/8 have a part-time job aside university.

#### Focus Group 2:

Alessandra, Arnaud, Béatriz, Brigitte, Dhony, Evana, Fabrizio, Marilia, Mélanie, Sarah and Sheba.

- This group is made of students from the Art & Design School of Geneva, Social Work School of Geneva, Business School of Geneva and full-time workers, recent graduates.
- The average age of the group is 24 years old (1995) and the median age is 23 years old (1996).
- 10/11 live in Geneva and 1/11 lives in Bienne. In terms of origins and ethnicities, the group is very diversified.
- The Art & Design students, or “the designers” are Béatriz, Brigitte, Dhony and Fabrizio. Sheba is the student in Business, however she is strongly related to the fashion and apparel industry in terms of hobbies and freelance jobs (seller and model). Alessandra, Evana, Mélanie and Sarah are Social Work students. As per Arnaud and Marilia, they are the recent graduates and full-time workers in Econometrics and Human Resources (she was a student at the HEG the year before. As per Arnaud, he did his master at the UNIGE).
- 6/8 are enrolled in the full-time program and 2/8 in the part-time program and 4/8 have a part-time job aside university.
- Currently, 7/11 are full-time students, 2/11 are full-time workers and 2/11 have a side job in addition to their full-time enrollment.

### 3.2.2.2 Most recurrent Answers from each Focus Group

**Table 3: Top Answers Focus Group 1**

FOCUS GROUP 1: 8 people			
THEMES	Nb of mentions	Ref. Question	Who mentioned
"I do not trust brands at all"	7 / 8	#13	Everyone except Elisa
"When I shop, I like to go to both specific and multi-brand stores"	5 / 8	#9	Marc, Ivan, Joëlle, Nicolas and Guillaume
"I observe people in order to inspire myself"	4 / 8	#4	Marc, Joëlle, Nicolas, Guillaume and Darwich
"My friends influence me the most when I shop"	4 / 8	#6	Elisa, Marc, Nicolas & Guillaume
"My family influences me the most when I shop"	4 / 8	#6	Ivan, Joëlle, Cécile & Darwich
"I consider myself as a "considerate/thinker" buyer"	4 / 8	#7	Joëlle, Nicolas, Cécile & Darwich
"I consider myself as an "impulsive/spontaneous" buyer"	4 / 8	#7	Elisa, Marc, Ivan & Guillaume
"In terms of importance given when I shop, Quality > Price"	6 / 8	#8	Elisa, Ivan, Joëlle, Nicolas, Guillaume & Cécile
"Shopping is more a pleasure than a burden, in general"	5 / 8	#5	Elisa, Joëlle, Guillaume, Cécile & Darwich
"I am part of a loyalty program"	4 / 8	#17	Ivan, Nicolas, Cécile & Darwich

Both **Table 3** and **Table 4** hereabove and hereunder are synopsizes of the summaries (**Appendices Y & Z**) of the answers collected during the focus groups sessions. In other words, the discussions have been so rich in terms of information and diversity according to the personality traits of each of those millennials that, in order to synthetize and make it look clearer, the research established tables based on the recurrences of the answers given, considering them as "common agreements".

More specifically, the "THEMES" given in the tables are not a rephrasing of the questions but are common answers to the questions asked during the focus groups. The "Number of mentions" are the number of the people proportionally who agree with the statement given, either partially or fully. The questions to which those statements answer to are numbered and referred in the third column, questions that you may find in the **Appendix Q3** for the Focus Groups in English. Finally, accordingly to the number of mentions, you may find in the last column of the tables the names of the participants who agreed to the



statements and may, if you want to obtain further profile and demographics information, refer to the table and figures at the beginning of the “Results” section.

There are 10 top statements chosen for each of the top answers’ tables, over 19 for Focus Group 1 (with 8 participants) and 10 over 23 for the Focus Group 2 (with 11 participants). Most of the answers from these two tables come, as a common agreement, related to purchasing habits. There are fewer alike statements regarding the brands and, even less, with style/appearance sections.

**Table 4: Top Answers Focus Group 2**

FOCUS GROUP 2: 11 people			
THEMES	Nb of mentions	Ref. Question	Who mentioned
"For my style, I get inspired either on social medias or by someone in particular"	8 / 11	#4	Arnaud, Béatriz, Brigitte, Dhony, Fabrizio, Marilia, Sarah, Sheba
"I give a lot of importance to my appearance"	7 / 11	#1	Alessandra, Béatriz, Brigitte, Dhony, Fabrizio, Mélanie, Sarah
"A brand should be ethic/have ethical standards for me to buy from it"	7 / 11	#13.5*	Alessandra, Arnaud, Dhony, Evana, Marilia, Mélanie, Sarah
"When I shop I prefer to go to specific brand stores"	7 / 11	#9	Alessandra, Béatriz, Brigitte, Dhony, Fabrizio, Mélanie, Sheba
"When I shop online I like to shop from both specific and multi-brand websites"	4 / 11	#10	Béatriz, Brigitte, Fabrizio & Sheba
"I consider myself as a "considerate/thinker" buyer"	5 / 11	#7	Béatriz, Brigitte, Evana, Marilia, Sarah
"I consider myself as an "impulsive/spontaneous" buyer"	7 / 11	#7	Alessandra, Arnaud, Béatriz, Dhony, Fabrizio, Mélanie, Sheba
"In terms of importance given when I shop, Quality > Price"	5 / 11	#8	Alessandra, Brigitte, Dhony, Evana, Fabrizio
"Shopping is more a pleasure than a burden, in general"	8 / 11	#5	Arnaud, Béatriz, Brigitte, Dhony, Fabrizio, Marilia, Mélanie, Sheba
"I am part of a loyalty program"	6 / 11	#17	Alessandra, Béatriz, Dhony, Fabrizio, Marilia, Sheba
Highlighted : For this question, 3 people (Marilia, Mélanie and Sarah) said they prefer to buy on specific brand websites and 3 people (Alessandra, Arnaud and Evana) said they prefer to buy on multi-brand websites.			

*13.5\* refers to the Appendix Q3, as this answer is about an additional question from the questionnaire that wasn't asked to the first focus group.*

### 3.3 Analysis of the interviews and focus groups

#### 3.3.1 Experts Analysis

As showed in the **Table 1 and Table X** with further details regarding the recurrence (in the Appendixes), the topic on which all of the specialists agree the most is, as demonstrated quite distinctively, **“Millennials privilege and seek for experience more than ownership”**, with **16** (general) mentions during the whole primary collection. When this research states general, it means that the expert developed a minimum or discussed a bit about it, not simply “mention” as a keyword emergence, popping between sentences. As M. Golnam illustrated it perfectly, this justifies the actual trends in regards with Airbnb and Uber, as well as the tremendous success of these business models that keep increasing and being developed worldwide.

Now, if we take this statement and apply it to the business context, which was perfectly done by Ms. Baer and Ms. Bergner, where they refer to the experiences in the store, they mention the following:

*“Maybe today we are looking more for an experience that goes beyond the product, we no longer want the product alone or simply the financial transaction, this gross side. We're looking for something that makes us feel smarter, more beautiful, the feeling that we've experienced something and have memories of it, all of that is in the emotional realm and I sincerely think that's what's important today: this is what we feel, this is what goes beyond the raw state, and that's why Apple is so successful today. Even if in the end we have a phone that is always too expensive for what it is, at the very moment when we have the feeling that we are part of something, that it changes our lives, that's where everyone wins because we end up associating that good with our lifestyle, and it works. I also think that all of it is very much linked to the identity of people and their ambitions because, at the end of the day, we all have our "dream-self".”* **Tiffany Baer**

*“Meanwhile I was working for Coty, a research was done on Millennials' behavior and it came out that this generation use a lot more of hashtag “#” searches on Instagram than using Google Research when they are looking for a potential product to buy. Whenever it comes to retail shopping for Millennials, it is a lot more about experience. Why? Simply put, because if you want to buy anything online and have it delivered at your place, why should/what could be the reason for you to go in a store? The only answer to this is experience. Retail shops need to create an atmosphere that is similar to a showroom and Sephora, in terms of shop experience, does it quite well.”* **Anouk Bergner**

The discussed topic that comes second as a common agreement between experts is **“There is a behavioral change from this generation”** and, the topics that come on the third place, which are surprisingly 5 of them being repeated at an equal number, are:

- **“Millennials are more similar than different compared to other generations”**

- “The best way to access to millennials is through digital and social media”
- “Value perception and brand community are key for millennials”
- “Constant and meaningful communication are key to acquire millennials”
- “Millennials are influenced by social media ambassadors (influencers)”

Among the five topics listed that were repeated equally, two of them will be developed in this section of the research, being the fourth, about “constant and meaningful communication” and the fifth, “millennials are influenced by social media ambassadors”. As per the three others, we will come back to them a bit further on, in the discussion section.

One expert who mainly insisted on the importance and the usefulness of **constant communication** is M. Marquaire: Indeed, he has been able to develop and justify the relevance of this act from companies and brands in general. He mentioned that there is a wide range of branding strategies but nowadays, loyalty between brackets is mostly done outside stores and on social networks. As for other communication tools, he does not hesitate to point out that despite the fact that newsletters and email exchanges may be criticized by everyone, they are not, to say the least, less important than others and should not be neglected by companies and brands:

*“The reality is a little more nuanced. Brands believed that their customers’ loyalty was acquired and for a long time, brands did not make any effort to maintain, preserve or reward this loyalty. There has been a turnaround and today, I do not think that fidelity does not exist either, but I am certain that this one depends on one factor:*

*In short, as long as the brand continues to use a conversation space, as long as new things, new collaborations, new partnerships are happening and as long as the brand is alive in the person’s visual space, the person will continue to give loyalty. Not communicating means decreasing and also means giving way to new competitors. If the brand continues to communicate, it maintains its network.”*

**François-Xavier Marquaire**

Also, due to her experience and expertise, one of our experts says:

*“Companies and brands must be aware that this generation gives a lot of feedbacks, instantaneously, and others from the same generation will read them and do further “researches” before buying a product from your company. You should take advantage of this very direct communication which is extremely important for both companies and consumers.”* **Anouk Bergner**

### **3.3.1.1 Cross-Analysis Experts and Focus Groups**

The third topic that this research would like to look into in more detail, despite of the numerous answers and affirmations obtained (which can be found in summarized

interviews at the bottom of the document, in the **Table X**), will be how and who influences millennials the most. From the experts' point of view, the answer that stood out the most is, with no surprise, **brand ambassadors and social media influencers**, which is linked to one of the common statements of the table as well, being the way marketing, itself developed and changed since then. The three experts who agree, either partially or fully about this matter, are all except Prof. Arash Golnam, as it is part of the questions skipped, since it is not part of his expertise. Also, this topic will be transactional between the experts' results and the Focus Groups ones. Let's start with Ms. Bergner:

*"Marketing itself has changed a lot because of the internet and of the social medias; before, it used to be only a few brands that had the means to reach consumers, to have a look at how marketing started: first, it was a door-to-door type of thing, so you had to have sales forces and it was very localized. Then, there was the era of the big advertising on TV: you had to have a specific budget and you needed to know exactly which channels you were going to invest in for your ads and who was your target audience (type of "Mad Man" move era, type of branding and marketing).*

*It was sort of "the traditional model" and I think it changed so much in the last couple of years through the use of social media and the internet that, even if you are just a tiny brand getting started, you could very easily get a follower base and put your product out there. So obviously, that kind of levels, the kind of "plan field" on how brands compete. And I think for big brands that has definitely been a difficult change in the way you they were approaching advertising and marketing because it created a lot more of competition and more competition from brands that could have never competed. I also think it is a good thing because it gives more chances and kind of takes away the monopolization of the big brands. When I used to work for Coty, I there was an amazing Digital Marketing Director who used to check middle and senior managers' phones to see if they had any social media accounts and apps such as Facebook, Instagram or Snapchat. She used to do this because she believed that if you did not used those tools, you were not really able to reach the younger generation."* **Anouk Bergner**

Still in regards with the same theme, Ms. Baer completes Ms. Bergner's point of view by stating the following, in regards with social networks importance and impact:

*"I think that today the environment is also virtual. If we take a symbolic entourage, we can also consider that the entourage of influencers on social networks is part of the person's entourage because they will follow them daily, listen to what they say and follow their advice, be inspired by them. Finally, it's an extended environment and I think it's an event that wasn't there at the time, today we contact and connect with strangers somewhere and it has a pretty strong impact on this generation of young consumers.*

*Brands, in addition to having gained in power in terms of evolution and information, now have the means to show their products all day long compared to then. For example, Kim Kardashian is dressed in brands from head to toe, she alone is a shop window and the impact is much stronger, faster and instantaneous."* **Tiffany Baer**

Ms. Bergner and Ms. Baer have been very clear and concise when talking about the marketing tactics and strategies changes as well as its impact. This evolution, well described thanks to her expertise in both Coty and P&G, is highlighted by Tiffany Baer hereabove when she says that businesses now have a shop window, an exposure of 24h/24. It is a very powerful wave that the digital world enhanced and, along with it, comes the social media and influencers:

*“Again, social media and influencers such as the Kardashians have a huge impact, their testimony and that they are paid thousands of dollars for a post. This fact does not only affect the Millennials generation, it goes way beyond that and it is an interesting change in how products are marketed through the internet.”* **Anouk Bergner**

Both experts mention the Kardashians, which is interesting. However, it has been demonstrated by millennials themselves that, despite of them being tech-savvy and constantly checking social medias, only 1/8 from the first Focus Group, Elisa, stated that she inspires herself on social media and none of them, from the same group, stated that they are impacted even a minimum by ambassadors or influencers. Here comes the validation of the immunity from advertising being well-known from millennials and confirmed by the experts. However, regarding Focus Group 2, 8/11 stated confidently and unashamedly that social media is a big source of style inspiration to them.

Why such a difference? As this research knows, it is complicated, mostly impossible for participants in Focus Groups not to be influenced by each other at a moment or another. As this may be the most logical reason, when we take a closer look at the groups profile, we can observe that the skepticism from the first group may be simply justified by their field of studies: Business. Indeed, there may be a correlation between consumer behaviors and the knowledge gained through further studies from people and would also justify this gap between the two groups.

Also, the second Focus Group is younger and extremely well-informed in terms of celebrities, brands and trends in general for it is an added value to know such information in this creative field of Art & Design. Plus, over 20 millennials, 3 of them (two from the first group, being Guillaume and Cécile and 1 from the second group, Dhony) admitted that they never shopped or ordered any clothing or related good online. Here we have an affirmation that, despite of the proven impact of influencers and social media on millennials' behaviors and purchasing habits, those are not efficient at 100% and cannot be used as a standardized tool, which is why customized ads were developed in various social medial algorithms and have been sold to them.

However, hereunder, we can observe an interesting statement from François-Xavier Marquaire, which is the following:

*“The only thing we can certify is that these people are still governed by an act of purchase made by influencers, whether direct or indirect. When an influencer or actress wears a new dress, just look at the shopping rush that is coming. When Kate Middleton wears a new branded dress, in just two hours it will be unavailable throughout the United Kingdom due to the stock shortage.*

*Circles of influence work according to brands but work mainly with the female market and increasingly with the male market. On the other hand, everything that is marketing celebrities in this range of prices and products is outdated: the celebrities of the high standing have almost disappeared except when there are collaborations. For example, when H&M releases a limited edition (Balmain), prices are significantly higher and generally with international designers. So, there is also an attraction to fame but once again the networks of influence, more precisely the influencers come first and have an immediate effect.” **François-Xavier Marquaire***

The most interesting part that should be retained in this quotation would be “The only thing we can certify is that these people are still governed by an act of purchase made by influencers, whether direct or indirect” and “Circles of influence work according to brands ...”. Here, what our branding specialists says is that, contrary to previous statements, there is indeed an influence, but it does not emerge only from social media and it may also come from millennials’ surrounding/peers and, at the same time, be as strong in terms of impact.

He also mentions that this one works according to the brands, meaning the brand’s community. We can observe this type of case with Nike for example, where you have a sportive and “sneakers addict” community since the launch of the products’ range of Michael Jordan, that made Nike even more successful.

This testimony about the direct and indirect influencers has been validated by the Focus Groups: we can observe in the **Table 3** hereabove, with the statement in Focus Group 1: “**I observe people in order to inspire myself**”, mentioned by half of the group. The correlation can also be seen in the **Table Z** with Focus Group 2, the same statement, with 4/11 millennials agreeing to it. What is even more interesting is that out of the 8 participants who answered it the disparity in genders is done equally, being 4 women and 4 men.

Plus, Ms. Baer aligns and justifies M. Marquaire’s testimony by saying:

*“In the absolute sense of the human being, we are more likely to survive by following the advice of our peers than by someone unknown to us.”* **Tiffany Baer**

There are numerous topics and statements collected from both groups and experts that result like the ones mentioned, which will be treated in the Discussion section of the thesis. Also, due to the quantity of assumptions possible for each of the testimonies given from both parts, this paper will treat the most recurrent ones only in order to offer you, readers, a research as structured and clear as possible.

### 3.3.2 Focus Groups Analysis

#### 3.3.2.1 General Statements and Interesting Answers

**Table 5 – General/Interesting Statements from both Focus Groups**

FOCUS GROUP 1 (8 people)	FOCUS GROUP 2 (11 people)
General statement: "I enjoy shopping much more when I'm on holidays/vacations"	"I avoid shopping in stores as much as possible": Béatriz
General statement except Cécile, who also buys from them: "I do not follow any brands on social media"	"I dress for myself before dressing up for others": Dhony, Brigitte, Béatriz
"I prepare myself in the morning in 5 minutes": Ivan, Nicolas	"I go shopping with my mom and she helps me choose the clothes": Evana
General statement: "I don't feel connected to brand at all except to locals/little shops, I trust them more"	"I worked directly in the fashion industry (seller or other)": Sheba, Béatriz, Dhony, Fabrizio, Brigitte
General statement: "Shopping is a pleasure in general but now do not have enough time to enjoy doing so"	"No one, nothing inspires me": Evana and Mélanie
General statement: "I am not conscious at the moment I purchase"	"I prepare my outfit the night before": Arnaud, Brigitte, Marilia, Sarah and Sheba
General statement except Cécile: "I do not consider myself as brand-loyal"	"I take more than 20 minutes to get ready in the morning": Alessandra, Béatriz, Brigitte, Evana, Marilia, Mélanie and Sheba

For this division, we will focus only on the **Table 5** and **Table 6** hereunder, which consists of general (by general we mean everyone in the group, 90% approximately of consensus is given to an answer) and interesting (by interesting we mean out of the frame or psychological aspects that have not been observed with other participants, or very clear contrasts between the two groups) facts. Each of these tables offer 7 utterances each.

If we focus to those that may cross from one group to another, we can observe less modesty, shamefulness from the second group towards their habits and own advices. This may be justified either by a more creative state of mind from them, whereas the first group is more rational; or simply put, maybe some more self-consciousness from the second group compared to the first, as all of them confessed at the end of the discussion that most of the questions asked, they had never thought about or reflected upon before the experience.

These behaviors are reflected in the following affirmations "I go shopping with my mom and she helps me choose the clothes"; "I dress for myself before dressing for others"; "I prepare myself in much more than 20 minutes in the morning (FG2)" versus "I prepare myself in 5 minutes in the morning (FG1)" -where, for FG1, the maximum stated time was 25 minutes; etc. There were, however, two participants that were more transparent in the first focus group, being the Joëlle and Cécile. Joëlle has been quite transparent by



showing how one of her business classes, CSR & Ethics, impacted and changed her purchasing habits and consumption in the apparel industry. Indeed, during this specific class, she had to calculate how many slaves worked for her according to her house goods and how many planets we would need if the whole world consumed as much as she did.

When the results were revealed, she admitted that she was astonished by it and decided to make an effort and be much more conscious in the way she purchases and consume. She is also the participant who launched a common statement hereabove, after that discussion, being “I do not feel connected to brands, more specifically multinationals. However, I trust and feel much closer to local brands and shops”.

Now, if we take a closer look into the designers from the second group and Sheba, we can observe that there are 5 of them who work/worked, have/had a direct link with the apparel industry. It has been observed and admitted by them that, because when working in this industry there are requirements to have some brand and product knowledge; psychologically you are more tempted to buy products from the company you work for than a casual customer. This may be justified by the repetitive speech and reception of information related to it, being similar to the advertising process and brain memorization.

Also, now back to the business group (FG1), they may have been showing some humility and reserve by admitting the importance and their relationship either towards their appearance or their relationship with brands because they have this “manipulative” perception of businesses as well as a grasp of the superficiality from “marketing” that may justify their answers: If they would admit they give importance to their style and to brands, they might feel that they have been manipulated or “put in the same bag as others” and they do not want it because, compared to the other group, they have this “Business knowledge” and are aware of the way it works.

Hereunder, you may find the **Table 6**, which corresponds to question 16 in **Appendix Q3**, where the groups were asked to think about one brand in particular, then tell which were the two words that came to their mind when they thought about it and name the brand they thought about. The results of this question are quite interesting:

**Table 6: Brand Association (One Brand Two Words)**

FOCUS GROUP 1			
	Brand	Word 1	Word 2
Elisa	H&M	Red	Clothes
Marc	H&M	Nordic	Cheap
Ivan	Nike	Performance	Sport
Joëlle	SWATCH	Reachable	Watch
Nicolas	H&M	Recognizable	Cheap
Guillaume	Vacheron Constantin	Luxe	Elite
Cécile	Kookai	Medium range	Quality
Darwich	Adidas	Shoes	Sport

FOCUS GROUP 2			
	Brand	Word 1	Word 2
Alessandra	H&M	Cheap	All-style
Arnaud	C&A	Affordable	Convenient
Béatriz	Weekday	Quality	Price
Brigitte	Primark	Exploitation	Pollution
Dhony	COS	Me	Expensive
Evana	Zara	Expensive	All-style
Fabrizio	Asos	Choice	Price
Marilia	Zara	Affordable	Choice
Mélanie	Swarovski	Quality	Cheap
Sarah	Asos	Diversified	Affordable
Sheba	Asos	Choice	Price

The interesting part with this table would be again the influence effect for both groups that can be distinguished as well as their brand association. For the first group, the influence wave goes for the chosen brand that comes to their mind.

Nevertheless, it is interesting that, except for the word “Cheap” that comes twice with Marc and Nicolas, the three of them mention 4 different words in terms of brand perception. We can also notice that there is a more visual aspect given from the first group with words such as “Red” and “Recognizable”. Whereas, the second groups, in terms of word description, comes with 12 words related to either price or quality and the first group with 6 of them.

The second group repeated 2 brands, being Asos and Zara. The fact that Asos is mentioned is extremely interesting, as Ms. Bergner highlights the following: “

*“You are thinking like “brand” but for me, even multi-brands, like channels can create brand image like Sephora, they don’t only have their own brand, they have many brands but what they offer is the experience around it, their support, their advice on how to use a product for example.*

*So even if you’re going to Sephora you might not be loyal to one brand but you may be brand loyal to Sephora because you get that experience there and I think*

*apparel can be the same thing, for example “prêt-à-porter” create a whole identity around it (...), all this added value in going there does not really mean you are brand-loyal to that brand but you are brand-loyal to that company.” **Anouk Bergner***

What Ms. Bergner affirmed hereabove has just been affirmed with the answers of Sheba, Sarah and Fabrizio, being “Asos”, a multi-brand website, considered as a brand itself by the millennials.

Besides, this research would like to highlight two specific answers, from Ivan (FG1) and from Brigitte (FG2). Ivan, for instance, is one of the few, along with Guillaume, to have split out words that are reflective with what the brand wants to spread as its image and identity. Brigitte, on the other hand, was the only participant who thought out of the box and instead of focusing on brands description, she speculated “Exploitation” and “Pollution”. Which is interesting as, first she is a designer and she may have expected this kind of answer from participants having Business knowledge (more specifically Joëlle, referencing the CSR story above). Also, only 3/19 of the participants mentioned brands linked with accessories/jewelry, as all of the others mentioned clothing brands in general.

If we were to do a cross literature-data ascertainment, a subject that has been mentioned but not reviewed as it deserves would be this so-called environmental and socio-cultural commitment on the part of this young generation: Indeed, if we return to Figure 3 on page 21 of this document being “factors affecting consumer behavior in different countries”, those taken into account in this graph are environmental friendliness, quality concern, fit, comfort and price. In the two different groups of countries, the first comprising Italy, Mexico, China and India and the second including U.S., United Kingdom and Germany, the environmental factor is the lowest of the other four (85% and 60%) (*Consumer behavior, fast fashion and sustainability* 2018).

If we now take the interviews with the experts, where Ms. Baer, Ms. Bergner and Mr. Marquaire attest that “millennials are more conscious” in social and environmental terms, they are contradicted by the focus groups. In fact, if we observe the words given both in the “Brand Association” section in **Table 6** and in **question 11** of the questionnaire in Appendices Q3, Y & Z, only two people “denounce” scandals and/or misdeeds of companies and brands with the words “**Pollution**”, “**Exploitation**”, “**Exclusion**” and “**Obsolete**”, not to mention Joëlle's remark concerning her CSR course.

Based on the data collected in this research, we can perceive a contradiction between the experts' opinion on their perception of the millennials and the opinion of the

millennials themselves, implicitly. This is also demonstrated, in general, in **Figure 3** above, that environmental and possibly social awareness is not as present as expected. We also see a contradiction between the 4 highlighted words in this paragraph as well as the focus group's answer to **question 13.5** "what would it take for a brand to make you buy from it?", where 7/11 participants from the second group answer "**ethical**". We observe here a contradiction coming from the generation itself between the way it perceives itself in terms of importance, commitment and between the real importance that the millennials give and apply daily. In line with this, this research believes that the concepts of "**dream-self**" and "**social acceptance**", mentioned previously in the literature review and by Ms. Baer, are firmly linked to each other, as shown above. Here the conflict between these two concepts refers to Fernandez 2009 and Chan & Wong 2012, when they speak of social acceptance and "optimal distinctiveness theory". We can award a kind of social and environmental "washing/superficiality" from this generation which, by showing a certain interest in these causes, would be part of a community and would feel useful, hence the need for "leave something behind/make an impact" mentioned by the experts 4 times. The aroused question here is: is it a real need, a real desire on the part of this generation or, as demonstrated in this thesis, is it a form of superficiality that would link this need for social acceptance and the quest for this famous "dream-self" on the part of the millennials? This would be an interesting topic to explore in further researches.

## 4. Discussion

Now that you, readers, have been able to have a general view of both the subject's literature and main results collected primarily, this research will proceed to the bridges between these two by: either approving what has been found hereabove with the literature, counter it, highlight new concepts or give further data details and quotes that may not have been mentioned up until now.

For instance, let's head into the millennials' generation section as a whole, comparing it with the expertise of Professor Arash Golnam. Indeed, this expert has been able to confirm (Gurău 2012)'s sayings, when this researcher stated that the main cross-generational influences in terms of consumer behaviors were, as factors, the environment in which a person is born and raised as well as a specific period. The testimony given by Prof. Golnam goes as follows, when answering to the Question 3 (**Appendix Q1**):

*"You know, I think it's important to understand the environment as well. It's not just the people who are different: we may think that Millennials are more different compared to other generations and are somehow the product of the environment, but it also works on the reverse, as the environment is also a product of Millennials.*

*Why am I saying this? Well, just look at how companies have changed overtime and how we went from the monopoly of MNCs (Multinational Companies) to the breakdown of it, resulting into today's globalization: some parts of the work were done elsewhere and led to better access for individuals to as well as for SMEs (Small and Medium Enterprises), which were not able to expand before that. The most important phenomenon of this all was the internet in the beginning of the 90s, not only for informational purposes but also for the ability to do transactions online. We have the example of Amazon, which was at first a small online group seller and is today a global empire.*

*So, we cannot say that we see the Generation Y population in a vacuum without linking it to what happened before, from a technological point of view as well as in regards with globalization. Why do we see such a difference between Baby Boomers, Gen Y and Gen Z? It did not change much about them as individuals, but something changed about the structure, the environment in which these people were born that created differences among the population."* **Arash Golnam**

We also obtained a confirmation from (Kiner 2017)'s article, which stated that there were different types of millennials' consumer behavior in regard to the apparel industry as a whole and to their purchasing behavior in this industry: *"there are those who buy to be seen, to belong to a clan"* (which refers to the third floor of Maslow's pyramid); *there are those who capitalize on their image and there are those who sincerely love clothes* (demonstrated in the second focus group answers). However, it has been also

demonstrated from the first group a kind of indifference towards their appearance and how people perceive them, but this can be subconscious as well.

Another point that has been confirmed in the focus groups as well as in the experts' interviews is stated by (Kapferer 2008), who says that we live in an "attention economy", where consumers are overwhelmed by the number of choices that they have but cannot invest their time into comparing and doing much researches before making a call. We saw both profiles mentioned in the focus groups, shown in **Tables 3,4 and 5**. In the second focus group, a few participants even said that they avoid going into shopping stores (designers, Focus Group 2) and that a great number of millennials said that they would go shopping only after having done some researches online and having compared. Sheba stated, for instance, that when she shops, she will search on social media first for a piece of clothing that she likes, then try to find it online by browsing through several websites and if she finds it, then she would go shopping. On the other hand, the first focus group stated that they do not have time enough now to enjoy even a bit the shopping time. It also has been shown that the majority of millennials (12/19) consider themselves to be "impulsive buyers", meaning if they like something they do not tend to think twice before making a call, which would justify Kapferer's theory regarding the "attention economy".

It has been also shown that most of the millennials, for the apparel industry, are not self-conscious of their loyalty towards brands. The main examples are coming from the first focus group, which may be justified by the idea they have of brand-loyalty: it is not because they are not committed publicly and that they do not express their brand loyalty visually or expressively that they are not for instance brand-loyal. This statement adds to the "real loyalty" concept developed by (Jacoby, Chestnut 1978): millennials, because they do not feel fully connected or affectionately linked to brands feel as they are not brand-loyal, as a self-assessment.

Another aspect that is extremely interesting discussed in this research about the Generation Y is if they used to favor face to face or digital communication with brands. M. Marquaire, specialized in branding, gave us a very structured and clear answer in this regard, being:

*"During the pre-purchase phase, the Millennials favor digital communication, directly or indirectly with the brands: they look for trends, compare prices and see if there are alternatives on the market; they will try to find the cheapest price, or find exact copies of a designer dress that is worth millions and is the latest trend of the moment."*

Contrary to popular belief, physical buying is not dead, people always value rich buying sessions when they are in stores. Today, it represents 80% of clothing purchases compared to 20% of clothing purchases on the Internet, so it remains particularly important even in technological and digital times. We're interested in everything that's going on inside the store. We don't want to go to a factory, a soulless place, etc., in the same way that we look for clothes that make a bit of sense. When you enter a store, you are either looking for meaning or at the very least entertainment, something that goes beyond the transaction and the product itself.

When we are on the post-purchase, we return again to the digital world with newsletters, personal recommendations, reminders every three months with discounts, etc.” **François-Xavier Marquaire**

Figure 8 – Sociocultural Approach to Maslow and Fashion Brands

### SOCIOCULTURAL APPROACH TO MASLOW AND FASHION FROM NEEDS AND DESIRES TO BRANDS



The pyramid shown on the right side comes from the blog called “Fashion Retailer” (Segura 2017). The brand ranges are ordered in terms of price/affordability, in parallel with the Maslow’s Pyramid. This table can be interesting when we compare it to the brand association done with Focus groups, **Table 6**.

Before discussing it, let's develop a bit the concept of brand association, according to (Finkle 2018):

*“What is a brand association? A mental connection between a brand and a concept is a brand association. Brand associations pop to mind when a person thinks about a brand.*

*Brand associations are the mental connections between a brand and people, places, things, and emotions. When a brand and another thought occur together in anyone's mind, they neurologically connect and are more likely to be thought of together in the future. These associations may turn people to or away from your brand. Being mindful and strategic about them will build brand equity efficiently.*

*Examples of Brand Association: “Zara is fashionable, Coca-Cola is classic, BMW is driving performance”, etc.”*

Indeed, when we compare both, we can notice that 10/19 brands mentioned are in the Mass-market level (lowest), 8/19 in the Premium level and only 1/19 in the Aspirational level. Now, if we compare these statements with the answers given to the **Question 11**: “When I say “brand” to you, what word comes to your mind?” – **Appendices Q3, Y & Z**, the words that came out were for the first group: “Business”, “H&M”, “Style”, “Reputation”, “Shop window”, “Elite/Prestige”, “H&M” and “Label”.

As for the second group: “Exclusion”, “History”, “Aesthetic”, “Obsolete”, “Identity”, “Quality”, “Aesthetic”, “Style”, “Quality”, “Price” and “Values”. What is curious in that case is the divergence first between the two groups in terms of answers and associations made, but also the discrepancy between the **Table 6** and the answers given above.

However, the overview of it is logical, as mentioned earlier, since the majority of the words given in the brand association table were linked to price and quality, this linkage between the two pyramids makes sense.

Furthermore, if we add to this assertion the perceived value variable, with the testimony of our emotional and applied psychology expert, we have a crystal-clear picture from millennials. Let's first start with giving the proper definition of it, which is, according to <https://zorraqino.com>, the following:

*“Perceived value is the overall evaluation made by consumers of the usefulness of a product or service, based on the difference they perceive between what they receive and what they give in return, i.e. what it costs them. The higher the perceived value, the higher the interest of consumers in that product or service. A good purchase experience or the price, for example, increases the perceived value for a client.”*



Indeed, Ms. Baer studied for her PhD research the way consumers perceive product quality. As a result, she discovered that in the relationship that consumers have with the brand and with sellers, the perception of quality varies completely:

*“That is to say, when you are well received at Hermès, for example, the product will be perceived as having an emotional value and to be of very good quality. In other words, we will want to use it, we will have fun using it; it will have a social value in addition to its monetary value.*

*On the other hand, if we are received with mockery, contempt, disdain, poorly received in general and the seller does not seek to know our tastes, to know us as a person ... the quality of the product itself does not change but in fact, consumers tend to say to themselves "quality is worse" and therefore the perception of something that is as objective as quality totally varies and this according to how the brand presents itself to customers.”* **Tiffany Baer**

What Ms. Baer states is entirely true and therefore it is approved by both (Cross 2019) and the Focus groups. Even though there has been no explicit saying from the focus groups in terms of shop experience, it has been clearly demonstrated by them, from the words given as well as their purchasing habits on how their memory accepted and retained characteristics from specific brands, as shown in the **Table 6**.

We have here a perfect correlation between Ms. Baer's statements and Table 6 above, concerning the brand association. As our expert so well said and justified with her research, the experience in store (or even online depending on the relationship between the brand and the consumer) perfectly varies the perception of the quality of the products, but also of the brand itself. What we can learn from this information is the following: the future of companies in terms of connections, generating emotions, belongingness and memories.

As Ms. Baer explained, once again so well, it is extremely difficult for companies to generate emotions, especially in the digital age in which we find ourselves and due to the constant bombardment of information. Emotions only emerge when a certain information, at a given time, is considered relevant for the individual. The ideal tactic to be adopted by businesses would be to increase consumers' perceived value, lead to more positive brand association and to obtain their loyalty by applying experiential marketing as a strategy.

What does experiential marketing consist of, according to (Galetto 2017), is:

*“an advertising strategy that focuses on helping consumers experience a brand, experiential marketing veers off course from traditional strategies that broadcast brand and product benefits to a wide audience. Also referred to as engagement*

*marketing, experiential marketing may be comprised of a variety of marketing strategies geared toward immersing customers within the product by engaging them in as many ways as possible. Ultimately, companies utilizing this strategy want to help customers form memorable, emotional connections with a brand to foster customer loyalty and improve customer lifetime value (CLV)."*

The advantages of such as strategy are, in keeping with (Galetto 2017), are that brands in general will benefit every time that make a customer happy, and experiential marketing gives these feel-goods emotions to customers, as those are needed to cultivate real brand loyalty. By doing so, they have the secret ingredient of the recipe that will lead to word-of-mouth spreading of consumers about their favorite brands and products, which allows companies to build strong connections with them.

An example of experiential marketing that has recently taken place in Geneva would be the one applied by the Longchamp brand:

*"After New York, Paris and Bangkok, Geneva is opening its Café de Longchamp from May 14<sup>th</sup> to June 1<sup>st</sup>, 2019. The Family House, which celebrated its 70<sup>th</sup> anniversary last year, continues this celebration with the establishment of this ephemeral space. Located outside its Geneva boutique - on the Place du Molard side -, Café de Longchamp welcomes friends, customers and passers-by for a coffee created by Nespresso especially for the occasion. From June 3<sup>rd</sup>, the Café will then move to the 1<sup>st</sup> floor of the boutique."* (Dacuna 2019)

Now that we have developed the concept of experiential marketing, a question that comes to light is "what are businesses doing wrong?" in line with what the experts have been telling us so far, that they try to adapt themselves to everything and keep losing their identity, as the solution is more simple than it seems: with the recent successful business models like Amazon or Uber, brands in general are providing either an "easier life" to consumers by saving time or providing tremendous experiences that people want to talk and share about.

However, if businesses are in the middle, meaning if they do not either make customers' life easier or giving experiences worth sharing, they are becoming a kind of commodity, which is what happens with half of the businesses right now (Knox 2019). In order to avoid the middle, businesses must also acquire an essential variable in their equation, to gain millennials' **trust**.

Forethought, this research believes that the results provided from it arose questions and interesting topics to be further explored in the future or written about, such as:

- How and why are Digital Native Vertical Brands (DNVBs) and similar business models so successful with young generations and are able to go over their

skepticism? How and why does online experiences work even better than casual models?

- How important is brand association as a concept to businesses and has it changed today compared to before, as the newest generations are somehow immune to the traditional marketing advertising? According to this research's results and how could businesses improve it while avoiding "cause and social washing"?
- New business models have emerged in the apparel industry as well as trends such as "no shopping year": "rent your clothes" like RTR or LeTote in the U.S. How do businesses embrace or fight against the end of ownership will from younger generations and how successfully can they expand overseas?

In the coming section we will discuss what companies are doing wrong and, on the other hand, how should these ones better engage with this generation in order to obtain their loyalty, according to the primary data collected by the research.

## 4.1 Bias and Suggestions

The research worked thoroughly on the diversity of the participants and millennials in order to avoid as much bias as possible; in terms of age mainly and studies (for the focus groups); by splitting the sessions into two and by doing rounds/changing the order of the talking with the groups as much as possible.

The biggest bias encountered for the focus groups were, without any surprise, the influence variable. This one is extremely difficult to reduce and to avoid, despite of the participants knowing each other or not. Adding to the influence, the number of participants being limited to 19 (two groups of maximum 10 each in order to allow proper communication and enough freedom for each participant to speak); the quantity is not reflective enough to make a proper conclusion for a whole generation. Besides, further concepts had to be revisited and added in the literature review in order to be able to analyze thoroughly the question of the research. Finally, time and metrics are required to validate the research's findings and statements.

As for the experts, the main bias encountered was, unintentionally, that ALL four of them are part of the millennial generation (early) and were interviewed by a millennial. Even though their expertise is very strong, all of them have a minimum of background in psychology, directly or indirectly and it is merely possible for them not to apply self-reflection and self-analysis to their testimonies. Plus, the narrator of this research as well, being a millennial herself, may have biased some statements. In order to avoid doing so, this research has been richly justified and supported by the literature review of the subject, as a "double-check" and "richer, generational neutral" point of view.

Another thing that can be done in order to avoid such bias, as well in research as in real life, would be to avoid categorization. This paper means by that and highlighted by Ms. Baer, that millennials as a whole do not like to be categorized: even during focus groups, when the narrator, unintentionally used the word "influence" instead of "inspire", the first reaction they had was "no one influences me", as if they were saying "I am the one who decides what I want to do, I am not a sheep among others".

In avoiding categorization, the ideal would be, for both researchers and companies who target millennials, to try to understand them more: indeed, even though we "speak the same language" now as we understood and managed the tools they also use and know where to find their interests (in occurrence, on social medias), it is not enough.

The goal is to understand what kind of lifestyle they want to have and be smarter by, first, stop trying to acquire further and bigger market share as, it does not mean anything; and second, because by doing so, brands will lose their identities (as speculated by experts as well, **Table 1**). Millennials are constantly in search of discovering who they are and keep on admiring the difference, simplicity, transparency and people/things as they are, unique in their own way. Brands better follow these aspects first. Second, instead of categorizing them per generation and age, they should categorize millennials according to their interests, as mentioned by Ms. Baer:

*"It is a generation that is used to constantly changing and consuming on instinct. Berthan, Pitt & Parent have established a matrix called "the AO Framework", which consists of 4 categories of luxury consumers according to their interests in the product, for example: long-term, short-term, quality is more important than price or vice versa, etc. All this does not depend on whether or not you are a Millennial. It would be more intelligent for businesses to use this matrix if you want to categorize a potential customer base. For me, consumers, regardless of their age, generation, etc., the reasons why they consume a particular product are always the same at the end of the day." **Tiffany Baer***

Even if the millennials may want to taste a bit of each, they still have a top list of preferred or preferred brands, as a reference to which they will turn and consume whenever they want. It is a pre-sorting that is done on their part due to the plethora of choices they have at their disposal and due to the butterfly effect of this generation, but they are nevertheless loyal, and it is important that the companies that segment them understand this.

## 5. Conclusion

What results from this thesis is that millennials are not as different as one might think compared to previous generations: they have similar levels of brand loyalty and, at the end of the day, they pursue the same goal: the expression of self-identity and the generation of emotions through consumption.

We therefore conclude that, yes, we can segment the millennials like other generational groups in terms of interests, social community, etc. Nevertheless, they are different in the sense that

1. they are much more informed,
2. they are much more flexible of their choices (greater purchasing power, more choices in the market, mixed clothing style, several brands, constant follow/unfollow practice on social networks) and, finally,
3. they are much more empowered to express and share their experiences through the development of the environment in which they live: this is why we must pay more attention to how we treat them, physically or digitally.

What this research also shows is that millennials are a diverse generation who want to express themselves and who refuse to be put in the same bag but, more precisely, they are constantly looking for their “dream-self” while seeking for social acceptance: in other words, a real headache for companies that are constantly looking for THE solution that would agree all the millennials. The first point we draw from this document is **there is no “one-size-fits all” marketing strategy** to obtain millennials’ love and dedication: brand loyalty concepts must be adaptive.

Instead, we must seek solutions that are able to adapt in a sculptural way to each of them and mutate as quickly as they do: that would be the Holy Grail, because each one is different. We don't need to get everyone to agree, we just need to try to find the solution/platform that would look like them. The fact of constantly seeking to escape segmentation has, according to the data obtained from this research, paradoxically become the identity characteristic of this generation, which is both dynamic and determined.

It has been also shown that most of the millennials, for the apparel industry, are not self-conscious of their loyalty towards brands. The main examples are coming from the first focus group, which may be justified by the idea they have of brand-loyalty: it is not

because they are not committed publicly and that they do not express explicitly their brand loyalty that they are not for instance brand-loyal: there is a concrete divergence demonstrated in this paper between how millennials perceive themselves and how they truly behave.

Nonetheless, in order for businesses to align with them, they have to first keep their brand identity while stop trying to adapt constantly to all the trends and accept the butterfly syndrome of this generation. Also, companies must take into account that it is extremely difficult to provide emotions to a generation that is constantly bombarded with information and that emotions emerge as soon as they are considered relevant. The objective of companies should therefore be to make a difference with higher perceived value and do this in an effective way. The most concrete and successful example of tactic currently in use is experiential marketing, as mentioned previously in the document: it generates memories and is profitable for the company, is also less passive and makes it possible to experience something much stronger. By doing so, businesses will generate brand equity which, theoretically, will lead to brand loyalty.

This research believes that, aligning to the findings, in order for businesses to obtain millennials' loyalty, love and better engage with them, the innovative insights are as follows:

Firstly, as highlighted by the experts who participated in the research, by constantly adapting to market trends and wanting to "acquire them all", brands will lose their identity. The first but not least recommendation from the research is to brands to **go from brand positioning to taking a position**: Dear brands, know who you are, what are your products and what do you sell to your customers: master your fundamentals and stick to your identity roots as those are the most precious values that you have, otherwise you won't get very far. Moreover, millennials appreciate transparency, as shown in the document, especially when being sold to: they are attracted by honesty and their attention is caught when a brand is seen as authentic by them; this is why you, businesses, should carefully convey your mission and vision to them, be yourself, as mentioned, stick to your roots and avoid fake representation of your beliefs.

Secondly, know your customer better that they know themselves: use the data you have! Get to know what they are interested in, where do they like to go, which artist do they listen to, which celebrities they follow on social media, what they like, their pains and gains in order to offer them an experience as customized as possible.

One quote from Matt Britton, which is extremely relevant in the context of this thesis, is: *“Companies are sitting in board rooms and do not realize that the future is dictated by the sidewalks.”* (Williams 2017)

What he means by that is there's such a big disconnection between the people who are taking big decisions in companies and actually what's really happening, still today. If companies clearly demonstrate their value, either through reasonable price points or by creating value through a unique brand identity, those ones will connect strongly with their customers: this means demonstrating what a brand brings to the table in a relatable, entertaining way, fostering loyalty from the customer segmented.

Now that the basics tools are clarified in terms of market knowledge and self-awareness for brands, the best tactics that are recommended by this research are as follows:

The future is online: as Ms. Baer clearly speculated it, if you do not have a digital presence nowadays, your business dies. Millennials are a generation with whom brands **must** engage and communicate with constantly: they like to feel important and you must demonstrate it without hassling them; become customer-centric and send them personalized content is key and, as mentioned by M. Marquaire:

*“As long as the brand is alive in the person's visual space, the person will continue to give loyalty. Not communicating means decreasing and also means giving way to new competitors. If the brand continues to communicate, it maintains its network.”*

Besides, as a societal fact, what most of the people in general are very good at are pointing and criticizing but forget to thank and congratulate whenever things are doing great, this applies as well for businesses: **reward your loyal customers**, there is no such thing as free lunch in life and when you want to retain your consumers' love and commitment, weak investment – both time and money – is not an option! Plus, still in regards with online engagement, what most companies do wrong is trying to group Gen Y and Gen Z when using channel strategies online: according to the findings of this research and, again, stated by M. Marquaire, millennials generally have a three step online shopping process, where the pre and post purchase steps are done and favored online by them and that the actual purchased is preferably done in store; for that scenario in which this thesis believes, the best channel strategy to adopt will not be the most trendy one actually, the omnichannel, but on the other hand, the cross-channel strategy and allow millennials to either buy online or to book in store, more adapted to this generation.



Now the last topic that will be addressed as a recommendation is about the importance of creating experiences, as it is the most important element in engaging millennials and generations hereafter, as certified by the experts. Indeed, they want to know who, which brand they are investing in and want to feel that the brand in question know them: user experience is everything and, in order to satisfy this fundamental element for businesses, the next tool to create engaging marketing experiences for them is augmented reality (AR), already used by multinationals and luxury brands such as Gucci and L'Oréal. Creating experiences is the most important element in engaging Millennials and generations hereafter. They want to know the brand they're buying from and feel that the brand knows them.

User experience is everything and augmented reality is the next tool to create engaging marketing experiences. Augmented reality is benefiting retailers while directly addressing consumer concerns (Williams 2017). Without even leaving their homes, buyers can virtually try the products they are looking to buy. AR is a tool that will make the buyer's journey much more exciting, consumers will not hesitate anymore because of the uncertainty factor. AR has been a significant component in creating an interactive environment between buyers and sellers and in establishing an emotional link between product demand and consumer desires.

Again, as mentioned hereabove, emotions emerge only at the specific moment where individuals consider the information, content as relevant and, as mentioned by Ms. Baer, it is one of the toughest challenges that businesses are facing; as long as an emotional relationship is built between the brand and the consumer, loyalty and high perceived value come to life. For instance, this research believes that millennials are brand loyal in the apparel industry.

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## 7. Appendices

### 7.1 Appendix Q1: Experts' Questionnaire - English

1. What is your interface with Millennials? In which context? Do you work or target them?
2. How long have you been working with Consumer Insights?
3. According to you, what makes Millennials so special? Why are they such a topic of discussion today?
4. How would you describe them in three words?
5. How do you feel about this generation?
6. What distinguishes them from other generations? What are their similarities with other generations?
7. How do you think marketers/businesses approach or better access Millennials?
8. How would you describe Millennials' purchasing habits and behaviors?
9. what/who are the biggest influences in the apparel industry to Millennials?
10. Which criteria do you think Millennials consider the most important whenever they make a decision to purchase a product/service?
11. Do Millennials favor face to face or digital communication with brands? Why?
12. Which channels do you think Millennials adopt the most?
13. What do you think about Millennials' brand loyalty?
14. Why should Millennials be brand-loyal?
15. What do you think about Millennials' relationship with brands? Who is manipulated?
16. Do you think we can talk about a new model of brand-loyalty, specific to this generation?

## 7.2 Appendix Q2: Experts' Questionnaire - French

1. Quel est votre lien avec les Milléniaux ? Dans quel contexte ?
2. Depuis combien de temps travaillez-vous dans ce domaine ?
3. Selon vous, qu'est-ce qui fait que les Milléniaux sont si spéciaux et sont un sujet phare de discussion aujourd'hui ?
4. Comment les décrieriez-vous en trois mots ?
5. Comment vous sentez-vous vis-à-vis de cette génération ?
6. Qu'est ce qui les distingue et quelles sont leurs similarités avec les autres générations ?
7. Comment, selon vous, les spécialistes du Marketing essaient de s'approcher et de s'approprier les Milléniaux ?
8. Comment décrieriez-vous les comportements généraux et d'achats des Milléniaux ?
9. Qu'est-ce-qui (ou qui) influence le plus les Milléniaux dans cette industrie ?
10. Quels critères selon vous les Milléniaux considèrent le plus lorsqu'ils achètent ?
11. Quel type de communication avec les marques pensez-vous que les Milléniaux favorisent ? (Digital, face à face et pourquoi ?)
12. Selon vous, quels sont les canaux que les Milléniaux adoptent le plus ?
13. Que pensez-vous de la fidélité des Milléniaux envers les marques ?
14. Pourquoi pensez-vous que les Milléniaux devraient-ils être fidèles envers les marques ?
15. Que pensez-vous de la relation entre les marques et les Milléniaux ? Qui, selon vous, manipule qui ?
16. Pensez-vous que l'on puisse parler d'un nouveau modèle de fidélité envers les marques, spécifique à cette génération ?

## 7.3 Appendix Q3: Focus Groups\* Questions – English

### Style and Appearance

1. How much importance do you give to your appearance?
2. How much time do you take to prepare yourself in the morning, to prepare your outfit?
3. Do you consider yourself as being part of a category of style/having a defined style?
4. How/What/Who inspires/influences you the most in terms of style?

### Purchasing Behavior

5. When you shop, is it generally something you do for pleasure/fun or is it only by necessity and you may even consider it as bothering/a burden?
6. Who/What influences you during your shopping session?
7. How much time do you take before the purchasing decision? (Are you an impulsive/spontaneous or considerate/thinker kind of buyer?)
8. When you shop in a store, your first move/instinct is to touch the fabric of the outfit or to look at the price of it? (importance price-quality)
9. When you go shopping, do you go to specific brand stores or to distribution/multi-brand stores in general?
10. When you buy online, do you order on specific brand websites or multi-brand websites in general?

### Brands

11. When I say the word “brand”, which word comes first to your mind?
12. How connected/attached do you feel to brands? Define it.
13. How much do you entrust brands?
14. Do you follow any brands on social media? If yes, which one?
15. Do you buy from the brands you follow on social media?
16. Think about one brand in particular, which one is it and what are the two words that come to your mind when you think about that brand?
17. Are you part of a loyalty program? Which one?
18. Do you consider yourself as brand-loyal?

*\*Questions for Focus Group 2 were the same, we just added “What should a brand have for you to buy/have a good perception of it?” Between Questions 13&14*

## 7.4 Appendix Q4: Focus Groups\* Questions – French

### Style et Apparence

1. Quelle/Combien d'importance donnez-vous à votre apparence?
2. Combien de temps prenez-vous pour vous préparer le matin/choisir votre tenue?
3. Vous considérez-vous comme faisant partie d'une catégorie de style/ayant un style défini?
4. Comment/Quoi/Qui vous inspire/influence le plus en termes de style?

### Comportement d'achat

5. Lorsque vous faites du shopping, est-ce généralement quelque chose que vous faites par plaisir ou est-ce uniquement par nécessité et il vous arrive de considérer cela comme un fardeau/une gêne?
6. Qui/Qu'est-ce qui vous influence lors de votre séance shopping?
7. Combien de temps vous faut-il avant de vous décider d'acheter quelque chose? (Êtes-vous un acheteur impulsif/spontané ou réfléchi/pensif?)
8. Lorsque vous achetez dans des magasins, votre premier réflexe est de toucher le tissu ou de regarder le prix? (Importance entre prix et qualité)
9. Lorsque vous faites du shopping, allez-vous dans des magasins de marques spécifiques ou dans des magasins de distribution en général?
10. Lorsque vous achetez en ligne, commandez-vous sur des sites internet de marques spécifiques ou sur des sites internet qui regroupent plusieurs marques en général?

### Marques

11. Quand je vous dis "marque", quel est le mot qui vous vient en premier à l'esprit?
12. Dans quelle mesure vous sentez-vous connecté/attaché aux marques? Définir.
13. À quel point faites-vous confiance aux marques?
14. Suivez-vous/Êtes-vous abonné à des marques sur les réseaux sociaux ? Si oui, lesquelles?
15. Achetez-vous des marques que vous suivez sur les réseaux sociaux?
16. Pensez à une marque en particulier. Quelle est cette marque et quels sont les deux mots qui vous viennent à l'esprit lorsque vous pensez à celle-ci?
17. Faites-vous partie d'un programme de fidélité ? Lequel?
18. Vous considérez-vous comme fidèles envers les marques?

*\*Les questions pour le Focus Group 2 étaient les mêmes, nous avons ajouté "Qu'est-ce qu'une marque devrait avoir pour vous acheter/avoir une bonne perception de celle-ci ?" Entre les questions 13 et 14*

**Table X – Experts Interviewed Answers**

THEMES	Anouk Bergner	Arash Golnam	François-Xavier Marquaire	Tiffany Baer	TOTAL
<i>Millennials are more similar than different compared to other generations</i>	2 times	6 times	-	3 times	11 times
Millennials shouldn't be categorized	1 time	2 times	-	4 times	7 times
Millennials are a practical generation	-	2 times	-	1 time	3 times
Millennials are more conscious and favor transparency	4 times	-	1 time	4 times	9 times
<b>Millennials privilege and seek for experience more than ownership</b>	7 times	1 time	2 times	6 times	16 times
Millennials want to make an impact and leave something behind	1 time	2 times	-	1 time	4 times
Millennials adapt themselves more than other generations	2 times	1 time	-	4 times	7 times
Millennials tend to reconsider the system in which they live	2 times	1 time	-	3 times	6 times
Millennials are more brand-loyal	-	2 times	<i>"there's no brand-loyalty"</i>	1 time	3 times
Millennials are less brand-loyal	1 time	-		-	1 time
<i>The best way to access to Millennials is through digital and social media</i>	4 times	1 time	2 times	4 times	11 times
It is easy to work with Millennials (as a target)	-	-	3 times	-	3 times
<i>Value perception &amp; Brand community is key for Millennials</i>	4 times	1 time	1 time	5 times	11 times
<i>Constant and meaningful communication is key to acquire Millennials</i>	4 times	1 time	4 times	2 times	11 times
<u>There is a behavioral change from this generation</u>	5 times	-	3 times	4 times	12 times
Marketing itself has changed	3 times	-	1 time	1 time	5 times
The way businesses do has changed	1 time	3 times	-	1 time	5 times
There is a will to buy less but better (Quality, expectations and provenance)	1 time	-	2 times	2 times	5 times
Millennials are influenced by their peers and surrounding	-	-	2 times	2 times	4 times
<i>Millennials are influenced by social media ambassadors (influencers)</i>	6 times	-	3 times	2 times	11 times
Brands are losing their identity by trying to adapting too much to all the dynamics of the market	-	-	1 time	3 times	4 times

Final ranking (ordered)
Millennials privilege and seek for experience more than ownership
There is a behavioral change from this generation
Millennials are more similar than different compared to other generations
The best way to access to Millennials is through digital and social media
Value perception & Brand community is key for Millennials
Constant and meaningful communication is key to acquire Millennials
Millennials are influenced by social media ambassadors (influencers)
Millennials are more conscious and favor transparency
Millennials shouldn't be categorized
Millennials adapt themselves more than other generations
Millennials tend to reconsider the system in which they live
Marketing itself has changed
The way businesses do has changed
There is a will to buy less but better (Quality, expectations and provenance)
Millennials are influenced by their peers and surrounding
Brands are losing their identity by trying to adapting too much to all the dynamics of the market
Millennials want to make an impact and leave something behind
Millennials are a practical generation
Millennials are more brand-loyal
It is easy to work with Millennials (as a target)
Millennials are less brand-loyal

**Table Y – Focus Group 1 Answers**

**FOCUS GROUP 1 - Haute Ecole de Gestion (HEG)**

THEMES	Elisa	Marc	Ivan	Joëlle	Nicolas	Guillaume	Cécile	Darwich
My appearance is important/moderately important/not important	a lot of importance	for work: important; for everyday: moderately	moderately important	important according to her mood	not important at all	moderately important	important according to her mood	moderately important
I do have a specific style (defined or unique style)	depends on the mood and likes to wear colours	sport/chic	casual	mix of styles	casual	casual	classic/conventional	likes to break styles
I observe people in order to inspire myself		x		x		x		x
I am not influenced I only buy what I like			x		x			
Shopping is a pleasure in general (hobby, therapy) or a burden in general (only by necessity)	pleasure > burden	neutral	burden > pleasure	pleasure > burden	burden > pleasure	pleasure > burden	pleasure > burden	pleasure > burden
My friends influence me the most when shop	x	x			x	x		
My family influences me the most when I shop			x	x			x	x
I consider myself as a "considerate" buyer (wait, compare, take time before decision)				x	x		x	x
I consider myself as an "impulsive" buyer (spontaneous, if I like it I take it)	x	x	x			x		
Quality > Price or Price > Quality	quality > price	price > quality	quality > price	quality > price	quality > price	quality > price	quality > price	price > quality
When I shop I prefer to go to specific brand stores	x						x	
When I shop I prefer to go to department stores/multi-brand stores								x
When I shop, I like to go to both specific brand and multi-brand stores		x	x	x	x	x		
When I shop online I like to go to specific brand website		x	x	x				
When I shop online I like to go to multi-brand/collective brand websites	x				x			x
I never shopped online/I do not shop online						x	x	
When I say "brand" to you, which word comes to your mind?	Business	H&M	Style	Reputation	Shop window	Elite/Prestige	H&M	Label
I do not trust brands at all		x	x	x	x	x	x	x
I am part of a loyalty program			x		x		x	x

THEMES	Alessandra	Arnaud	Béatriz	Brigitte	Dhony	Evana	Fabrizio	Marília	Mélanie	Sarah	Sheba
I give a lot of importance to my appearance	x		x	x	x		x		x	x	
Style and appearance are means of expression and reflect who I am			x	x	x		x				
I do have a specific/identifiable style		streetwear	streetwear & feminine		My own style (undefined)		Fun-chic		My own style (ATC*)		
I observe people in order to inspire myself	x				x			x			x
I inspire myself on social media or have a person in particular who inspires me		x	x	x	x		x	x		x	x
Shopping is a pleasure in general (hobby, therapy) or a burden in general (only by necessity)	neutral	pleasure > burden	pleasure > burden	pleasure > burden	pleasure > burden	neutral	pleasure > burden	pleasure > burden	pleasure > burden	neutral	pleasure > burden
"considerate" buyer (check on apps before shop, compare, take time before decision)			x	x			x	x		x	
I consider myself as an "impulsive" buyer (spontaneous, if I like it I take it)	x	x	x			x					
Quality > Price or Price > Quality	quality > price	price > quality	price > quality	quality > price	quality > price	quality > price	quality > price	price > quality	price > quality	price > quality	price > quality
When I shop I prefer to go to specific brand stores	x		x	x	x		x		x		x
When I shop I prefer to go to department stores/multi-brand stores		x									
When I shop, I like to go to both specific brand and multi-brand stores						x		x		x	
When I shop online I like to go to specific brand website			both	both			both	x	x	x	both
When I shop online I like to go to multi-brand/collective brand websites	x	x	both	both		x	both				both
I never shopped online/I do not shop online					x						
When I say "brand" to you, which word comes to your mind?	Exclusion	History	Aesthetic	Obsolete	Identity	Quality	Aesthetic	Style	Quality	Price	Values
I am Poorly/Moderately/Very attached to brands	0/10	0/10	8/10	6/10	6/10	2/10	0/10	2/10	10/10	3/10	8/10
A brand should be aesthetic for me to buy from it			x	x			x				x
A brand should be ethic for me to buy from it	x	x			x	x		x	x	x	
I follow brands on social media			Weekday & Topshop	Acne & Jacquemus	Acne & Jacquemus		AmiParis & Jacquemus	MAC & Essence (makeup)	Lacoste		ASOS
I buy from the brands I follow on social media			x					x	x		x
I am part of a loyalty program	x		x		x		x	x			x
I consider myself as brand-loyal			x	x				x			x

\*ATC - adapt to circumstances

Are Millennials Brand-Loyal in the Apparel Industry?

Table Z – Focus Group 2 Answers

Nicole BERRA