

MESTRADOMARKETING

The disruption of retail through Gen Z:
An exploratory study on the new
customer journey and the impact of
customer touchpoints on Brand Loyalty
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THE DISRUPTION OF RETAIL THROUGH GEN Z: AN EXPLORATORY STUDY ON THE NEW CUSTOMER JOURNEY AND THE IMPACT OF CUSTOMER TOUCHPOINTS ON BRAND LOYALTY

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"According to Darwin's Origin of Species, it is not the most intellectual of the species that survives; it is not the strongest that survives; but the species that survives is the one that is able best to adapt and adjust to the changing environment in which it finds itself."

Leon C. Megginson,

'Lessons from Europe for American Business', Southwestern Social Science Quarterly (1963) 44(1): 3-13, at p. 4.

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Abstract

O estudo do perfil de consumidor de cada geração é uma ferramenta importante para a gestão de marca. No entanto, uma nova geração está a chegar ao mercado e trará inovação, disrupção e muita exigência às marcas. A Gen Z começa agora a entrar na maioridade e tornar-se-á brevemente uma das maiores fatias geracionais ativas. Em conjunto com o perfil de consumidor, a lealdade desta geração perante marcas é também uma incógnita. Além disso, a experiência do consumidor é impactada por inúmeros fatores que podem ou não ser controlados pelas marcas. Desta forma, os touchpoints que o cliente encontra do seu dia-adia moldam a forma como a marca e os seus produtos são percecionados. Assim, o estudo da Gen Z une-se à necessidade de conhecer o impacto que os touchpoints têm no consumidor resultando num estudo exploratório que pretende dar pistas sobre quem é a Gen Z e como se relaciona com as marcas.

O presente estudo parte de um enquadramento teórico dos temas abordados procurando na academia suporte metodológico para responder às questões de investigação propostas — Conhecer a Gen Z, como se relaciona com as marcas a nível de lealdade e qual o impacto de touchpoints. A metodologia escolhida, devido à natureza exploratória deste estudo, opta por uma parte de entrevista de profundidade para compreensão de comportamentos e sentimentos, um questionário para avaliação de Brand Loyalty, aliados a um método inovador de recolha de experiências — Real Time Experience Tracking. O estudo conduzido em Portugal conta com a participação de 35 Gen Z'ers entre os 12 e 18 anos. Posteriormente, foi efetuada uma análise cruzada dos diferentes conjuntos de dados obtidos, de forma a retirar insights sobre o perfil de consumidor Gen Z, a existência de brand loyalty nesta geração e a relevância dos touchpoints encontrados na experiência de consumidor.

The study of the customer profile of each generation is an important tool to brand management. However, a new generation is reaching the marketplace and with it a great deal of innovation, disruption and demands to brands. Gen Z is now becoming overage and will soon be one of the biggest active generational cohorts. Along with customer profile, brand loyalty in Gen Z is a doubtful matter. Besides this, customer experience is highly impacted by innumerous factors that may not be controlled by brands. Thus, customer touchpoints encounters are molding the way brands and products are seen. Gen Z's profile research intersects with a need to understand the touchpoint's impact on customers. The present exploratory research aims at providing insights on who Gen Z is and how they relate to brands.

The present research initiates from a theoretical framework of the subjects mentioned, searching for methodological support in academic literature to answer the research questions proposed – understand Gen Z, how they relate to brands regarding loyalty and the impact of brand touchpoints. The exploratory nature of the research embodies a mixed methodology approach enclosing in-depth interviews to assess feelings and behaviors, a quantitative questionnaire to evaluate brand loyalty and an innovative method of experience tracking – Real Time Experience Tracking. The research was conducted in Portugal with 35 participants aged 12 to 18 years old. The cross data analysis of the different datasets obtained was used to retrieve insights on Gen Z's customer profile, brand loyalty behavior and touchpoint relevance and characterization.

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Introduction

Relationships with brands are characterized today by constant and disruptive changes arising from the current innovative and technological context. As such, it becomes highly relevant to study deeply brand's touchpoints and how customers relate to them (Manser Payne et al, 2017). It is expected that the disruption will increase with the new generation of customers arriving to the marketplace, their influence on marketing and management issues and/or by their dimension and future buying possibilities (Priporas et al, 2017). Generation Z views the brand in a different way than their predecessors and connects in a totally new way with all the stimuli received (Google, 2016a). The importance of studying the connection between these topics is clear, being in the academic world where many of the issues and their intersection is very insipid. Also, on the management side it is very significant because they will soon have newer and more complex challenges in creating relationships and loyalty bonds with the new customers.

The present study aims to answer the problems companies are beginning to feel and will soon face at a larger scale. The proposed objective is to know who the Gen Z customer is and how he interacts with brands. Moreover, we also want to understand the customer's path to purchase of this new generation to make it possible to identify the available brand's touchpoints and which of them are responsible for and main motivators of brand loyalty construction and effective purchase. This research has an exploratory nature due to the lack of supporting research in academic literature and the novelty of the subject. Thus it aims at finding leads to follow on and shedding light on the subjects at hand. Nevertheless, the presented findings should be viewed as insights and not to as definitive conclusions, more like a ground basis on which to build new knowledge.

The insights achieved were reached through a mixed methodology – quantitative and qualitative, based on in-depth interviews, surveys and Real Time Experience Tracking (RET) methodology applied to children and teenagers between the ages of 12 and 18 years. The methodological approach based on in-depth interviews was used to know Gen Z and their path to purchase; an experimental technique of Real Time Experience Tracking (RET) was used to assess the characteristics and possible impacts of touchpoints. Finally, a brand loyalty

questionnaire was applied to better understand loyalty in Gen Z, in particular, concerning three of their favorite trainers' brands.

The base of this work comes from a brief literature review composed of the most relevant subjects to frame and define the subsequent study. Initially, the concepts of Touchpoints, Customer Journey and Customer Experience and Online Shopping experience are characterized, as well as, the brand value and its antecedents, closing with a description of the Generation Z customers, their behavior and relevance of the topic. The third chapter aims to present the research objective and questions, as well as, describing the chosen methodology and the main assumptions that guided the study. Following, the data analysis is explained in detail building on the research methods used. The main insights retrieved are based on a deep qualitative analysis of the in-depth interviews connecting the outcomes to the results of a brand loyalty questionnaire and RET method.

The results chapter comprises the full description of the results obtained from the data set analyzed issuing an interpretation of the results to achieve relevant insights on Gen Z and touchpoints. Building on the results obtained, the discussion is presented where the insights achieved are portrayed in a critical light with other academic researches. Lastly the limitations of the present study are identified as well as indications for future research that may build from the insights achieved.

I. Literature Review

The following chapter aims to theoretically frame the subjects that structure the proposed study. Firstly, the concepts of touchpoints, Customer Journey, Customer Experience and Online Shopping experience will be characterized and previous relevant studies on the subjects will be presented. Following, the brand value and its antecedents will be explained to identify the significance of the previous concepts regarding the practical consequences in business and brand management. The chapter ends with the description of the Generation Z customers and their behavior, as well as, a clarification on the relevance of the present work both for academic and management purposes.

Throughout the chapter the main gaps in the literature regarding each of these topics will be identified to construct the research questions and the proposed objective of study.

1. Touchpoints, Customer Journey and Customer Experience

1.1 Touchpoints

The concept of touchpoints in marketing and management literature can be understood as the moments of direct or indirect contact between the customer and the brand, where an interaction may occur (Baxendale et al, 2015). The touchpoints or interactions are moments that happen along the customer's journey and may include anything that provides some sort of information with the possibility of creating positive or negative impacts (Aichner & Gruber, 2017). Customer interaction with brands occurs in physical locations/stores as well as online stores, social networks, mobile applications (Guo, 2013). Customer satisfaction during the interaction with the touchpoints is critical to the purchase intention and customer retention (Lim, et al, 2015).

There is no consensus in academic literature on how to categorize touchpoints between brands and customers. Different typologies can be found listing different touchpoints.

According to Lemon (2016), the various types of touchpoints can be classified into one of four broader categories according to the ownership / control of these points (Lemon & Verhoef, 2016):

• Branded (brand-owned) - corresponds to interactions with the customer that are designed and managed by the brand, and include all elements of the marketing mix;

- Partner Controlled (partner-owned) Here are considered all contact experiences designed and managed jointly by the brand and its partners, such as communication agencies or distributors;
- Controlled by the customer (customer-owned) the authors describe the customerowned touchpoints as actions or thoughts the customer has during the various stages of purchase and in which the company or partners have no influence or interaction, such as, the customer's needs or wishes.
- Independent (social or external) In this category the authors identify all other touchpoints likely to affect customer experience and uncontrolled by any of the above mentioned actors. This includes outside influences, such as, other clients, independent information sources or opinion influencers.

The presented typology is considerably broader than others that are commonly found listed in literature, including as touchpoints the interactions and thoughts of the client and external factors.

Baxendale et al. (2015) on the other hand, list three categories of touchpoints. The study applied to retail distinguishes between the touchpoints of the brand and of the distributing retailer. The authors propose the division of touchpoints as those belonging to the brand (brand owned) that include brand advertising; the distributing retailer's touchpoints comprising advertising and in-store communications; and third party touchpoints where the physical or digital WOM (word-of-mouth), the influence of other customers and the traditional spontaneous media coverage such as editorials and news in the media are listed (Baxendale et al., 2015).

On the other hand, Manser Payne et al. (2017) present a high-level division between personal and non-personal touchpoints, which include:

Personal Touchpoints Non-Personal Touchpoints		
Store Interaction	Traditional Advertising	
• Sales force	 Non-personal in-store interactions 	
 Phone (inbound and outbound) 	 Direct physical mail 	
 Chat and live digital conferences 	• Email	
• Trade shows	 Catalogs 	
• Returns in store	• Web site	
	 Social networks 	
	 Paid and organic search results 	
	 Loyalty Programs 	
	 Returns by mail 	

Table 1 - Personal and Non-Personal Touchpoints (Source: Manser et al., 2017)

Zhao et al (2016) opt for a more traditional model of touchpoints of digital communication, differentiating by ownership: belonging to the brand (owned media); paid media and earned media. These categories correspond, respectively, to the official brand website; paid advertising on Google and Facebook, and opinion reviews websites like Amazon and Yelp (Zhao et al, 2016).

Distinctions can also be found between touchpoints communications and sales, as it is vital to link these two types of touchpoints to be able to convert marketing contacts into sales without losing the customer during the journey (Peltola et al, 2015).

1.2 Customer Journey and Customer Experience

The relationship of the brand with its customers is governed by the experience the customer has with each touchpoint offered by the company and how they interconnect with each other (Ieva & Ziliani, 2018a). The customer experience is characterized by being a subjective response of the customer to the stimuli / touchpoints in which he interacts with the brand (Stein & Ramaseshan, 2016). The evolution of technology has brought ecommerce and digital communication, and with it, a new set of touchpoints between the customer and the brand. The omnichannel experience, which aims to achieve a seamless integration of all interactions with the customer in different touchpoints, has been widely studied in the academy (Griffiths & Howard, 2008; Huré et al, 2017; Lemon & Verhoef, 2016; Manser Payne et al., 2017; Müller-Lankenau et al, 2006; Peltola et al., 2015). It is through the continuous interaction of the customer with the brand in different touchpoints that the perception of value emerges and forms the customer experience (Clatworthy, 2012). Customers expect consistent integration and quality from the brand at all times and in every touchpoint they encounter during their journey (Huré et al., 2017). The clients' experience develops during their journey and through contact with different points of interaction with the brands. These should always be as positive as possible to support the customer's transition through the different touchpoints in the journey (Peltola et al., 2015). In turn, the customer experience will have a very high impact on customer satisfaction and brand loyalty (Ieva & Ziliani, 2018a). This integration and satisfaction allows brands to obtain a competitive advantage in retail (Giraldi et al, 2016). Customer journey mapping permits identification of all touchpoints encountered by the customer during the purchase decision process (Ieva & Ziliani, 2018a; Martin et al, 2015). The path to purchase or customer journey refers to the ordered and non-ordered series of stages through which the customer moves through to the effective purchase, often initiated with the discovery of a need and ending in purchase (Srinivasan et al, 2016). According to Baxendale et al. (2015; page 238), the customer journey's outcome can be seen "as an interplay between multiple touchpoints and the customer's evolving brand consideration". Consideration is described as the customers' willingness to purchase the brand in the near future (Baxendale et al., 2015).

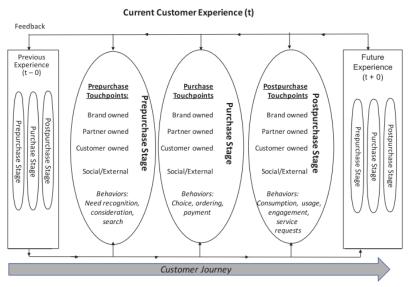


Figure 1 - Process model of the Customer Journey and Experience (Source: Lemon & Verhoef, 2016)

Customer experience with the brand occurs through different touchpoints and customer journey moments: pre-purchase, purchase and post-purchase (Lemon & Verhoef, 2016). In this sense, the touchpoint encounters happen at any stage of the customer journey, whether in the search, evaluation or moment of purchase (Stein & Ramaseshan, 2016).

The path of the customer remains unchanged in the literature, but the digitalization has created new opportunities of interaction in each stage of the route in order to aid the decision making process. The five stages of the customer's journey can be managed from a retail point of view to streamline the customer's journey (Willems et al, 2017).

Pa	th-to-Purchase	Classification Guidelines
a.	Need Recognition	- Informing customers about new arrivals to the stores or
		suggesting products to customers
		- Shopping lists
b.	Information Search	- Allowing customers to achieve fast and detailed information
		about products in the store
		- Allowing customers to indirectly compare options
c.	Evaluating Alternatives	- Allowing customers to directly compare alternatives
d.	Purchase	- Helping shoppers with the actual purchase of a product or
		service, for instance by making the payment process easier
e.	Post-Purchase	- Allowing customers to share reviews

Table 2- Path-to-Purchase Classification Guidelines (Source: Willems et al., 2017)

1.3 What do we know about touchpoints

According to the authors Wind and Hays (2016), the relationship with brands has been constantly and disruptively altered by five forces of change: advances in science and technology, redefinition of media landscape, skepticism in customers, a hyper-connected world and the emergence of new business models and disruptive revenues (Wind & Hays, 2016). These changes make the study of customer's touchpoints imperative due to its importance in the current context (Manser Payne et al., 2017).

The speed of change indicated by the authors above creates a need to fill gaps that are being found with the evolution of the current state of business. Although there are already several studies on touchpoints, there are still few studies on the effects of exposure to touchpoints on customer behavior (Zhao et al., 2016). The purchase behavior over the various touchpoints and the use of different touchpoints in the various phases of the customer's journey are topics that also need to be further exploited (Manser Payne et al., 2017). Gaps may still be found in the literature regarding the impact of various touchpoints in an integrated way *vis-à-vis* their individual delivery to the customer, since studies tend to assess the impact of touchpoints in isolation and not in a holistic way (Ieva & Ziliani, 2018b). Also, the psychographic or lifestyle characteristics that may have different consequences on the impacts of touchpoints have yet to be studied (Baxendale et al., 2015).

The interaction between brands and the impact of touchpoints with younger generations have not yet found much ground in the literature. The journey of the customer in these generations may have a different objective of creating future loyalty and not immediate purchase, as Kamila & Květa (2017) state in the study where the relation of different touchpoints in children growth phases is exploited. The authors try to understand which touchpoints are most relevant in different stages of the customer's journey with a focus on pre-purchase and at different ages - Pre-School; Primary school and Secondary school (Kamila & Květa, 2017). However, the study applies only to the automotive industry and used a very small sample.

1.4 Online Shopping

The growth of ecommerce has evolved in a stable and gradual way (Wareham et al, 2005). It has been marked by difficulties in the acceptance of technology as well as the perceived confidence of online retailers (Pavlou, 2003). The main issues detected are related to risks in carrying out transactions electronically, either by merchants reputation; security of payments

and personal data; quality of products acquired or distrust of the functional mechanisms and processes of the transaction (Beatty et al, 2011; Grabner-Kraeuter, 2002; McKnight et al, 2002). The apparent resolution to these issues builds on customer-retailer relationships in order to foster trustful bonds to mitigate risk perceptions (Corbitt et al, 2003; Fang et al., 2014). The quality of online platforms and their usage figures as mitigating factor as well (Gefen et al, 2003). Mobile Commerce comes as an extension of ecommerce that offers advantages like services based on location and accessibility creating the possibility of cross-device purchase (Chong, 2013; Marinkovic & Kalinic, 2017; Wei et al, 2009).

Cross-device purchasing is characterized by the use of several devices to perform a transaction. For example: searches on websites and online stores; price comparison; reserving products (Marriott et al, 2017). Mobile devices are becoming the preferred devices for cross-device customers, with 4 out of 10 purchases involving multiple devices and one-third of ecommerce sales involving prior mobile use (Mohammadpour et al, 2016).

2. Brand Equity and Brand Assets

The concept of Brand Equity does not find agreement in academic literature, either in its definition or its measurement. It is based on the added value to the products attributed to the brand they own (Su & Chang, 2017). Aaker (1992) proposed a description of Brand Equity based on a set of assets and liabilities of the brand linked to the name and symbol displayed that can increase or decrease the value of the product / service provided for both the company and the customers (Aaker, 1992). The author points out five attributes for brand value creation, which have been the basis for numerous studies conducted in the marketing and management areas.

• Brand Loyalty - The concept of Brand Loyalty is based on the intent of repeat purchase and continuous use of a brand or on the positive feelings and willingness to recommend a product (Dick & Basu, 1994). Not being at all a new construct, the literature contains an abundant amount of investigations on the subject, since its appearance as Brand Insistence (Copeland, 1923) in the early nineteenth century. Namely, the link satisfaction between customer and brand lovalty has already been widely explored (Bloemer & Kasper, 1995). The loyalty construct goes beyond simple repurchase, comprising two metrics. It includes the repetition from the behavioral perspective, but adds the continued intention to purchase in the future, as well as the

customer's degree of commitment and attitude towards the brand, from the attitudinal point (C. C. Huang, 2017; Menidjel et al, 2017). While behavioral loyalty takes into account factors related to action such as the cost-benefit relationship of buying and brand associations; attitudinal loyalty relates brand beliefs, affections, to commitment (Murray et al, 2017; Popp & Woratschek, 2017). (Chen et al, 2017; Huang, 2017; Jamilah & Handayani, 2017; Murray et al., 2017; Rialti et al, 2017; Vera & Trujillo, 2017; Zhang & Liu, 2017). Beyond these constructs, brand loyalty has also been studied in its absolute or shared nature from customers purchase patterns, as one customer can be loyal to more than one brand of the same product (Srinivasan et al, 2002). In this sense, loyalty can be undivided, divided, unstable or non-existent (Brown, 1953).

- Brand Name Awareness The recall ability of a brand is called Brand Awareness, that is, the potential of a brand and its information being remembered by customers and create links with other quality and reference dimensions that will have a relevant role at the time of purchase (Bilgili & Ozkul, 2015). (Arnas et al, 2016; Chinomona & Maziriri, 2017; Hurley et al, 2017; Lambert-Pandraud et al, 2017; Molinillo et al, 2017; So et al, 2016; Wang et al, 2016);
- Perceived Brand Quality The perceived quality of the brand is a dimension that encompasses two basic concepts, the first is the price paid for the purchased product / service that has a palpable component, the second is the subjective concept of quality that the customer perceives about what they are buying (Vera, 2015). (Calvo-Porral & Lévy-Mangin, 2017; Dens & De Pelsmacker, 2016; Liu et al, 2014; Mishra et al, 2017; Shue & Falahat, 2017; Vera, 2015; Vinh & Phuong, 2017);
- Brand Associations Brand associations are not only the ability of customers to recall them, but associations with positive or negative meanings that constitute the brand's meaning ((Abdolvand & Kia, 2016; Checchinato et al, 2016; Chen, 2017; Huang et al, 2015; Jeon & Baeck, 2016; Johnson et al, 2017; Mirzaei et al, 2016; Park & Lee, 2017; Wang & Horng, 2016);
 - Other brand-owned assets (e.g., patents).

3. Generation Z

3.1 Who they are and what do they think is cool

Generation Z or Gen Z is the latest generational cohort and one that will bring an even more dizzying disruption in marketing and management. There is no agreement in academic literature about the precise date of birth of this generation. Different studies put the birth of Gen Z starting at the middle of the (19)90 decade or from the year 2000 (Issa & Isaias, 2016; Kapusy & Logo, 2018; Pérez-Escoda et al, 2016; Priporas et al., 2017; Puiu, 2016; Southgate, 2017; Vallone et al., 2016). The year 2000 will be considered as the birth date of generation Z for the purpose of this research, which puts the age range of this population between 12 - 18 years old (Puiu, 2016). The births of 2010 and beyond are already framed in a new generation called 'alpha', the descendants of Millennials (Carter, 2016).

Millennials were born between 1980 and 2000 (Bucuta, 2015), successors of Baby Boomers and Gen X. They are characterized by their competence and technological agility, grown up with technology and Internet has had a strong impact on their development (Bilgihan, 2016). They are called Digital Natives due to the connection to digital which shapes all aspects of their lives, either professionally or socially (Bolton et al., 2013).

Generation Z is also known as Gen I (Internet) or Gen M (Multitasking) for its Internet connection and ability to perform multiple tasks simultaneously (Greydanus & Greydanus, 2012). Gen Z currently corresponds to individuals still below the age of majority who will soon begin to enter the labor market and become self-employed customers. Several studies demonstrate their influence on current family purchases in any retail category and therefore have a predominant weight in customer trends (Sener, 2011). This is the generation with the greatest connection to digital. While Millennials were born with the new technologies, Gen Z was born after them, being the first ones whose choice since childhood was the Internet and not television, being deeply involved with social networks, e-mail and other forms of digital communication (Greydanus & Greydanus, 2012). The immediacy and frustration factor in the face of slow responses is even greater than previous generations, shrinking from Millennials' 12-second attention span to only 8 (Shatto & Erwin, 2016). They are characterized by high expectations in the technological media, in which they are considered experts through use, being that they learn to use digital devices and the Internet even before they learn to read or write (Pérez-Escoda et al., 2016).

It is expected that this generation will be an influencer on marketing and retail practices due to its size and future purchasing capacity, since they are the drivers of innovation and have high expectations about products and brands (Priporas et al., 2017). This generation leads digital use; using the internet to study, work and socialize (Issa & Isaias, 2016; Kapusy & Logo, 2018).

According to Nielsen's Total Audience Report Gen Z is the largest generation cohort in the U.S. comprising 26% of the total population (Nielsen, 2017). The generational split shows Millennials encompassing 22%, Gen Z 20%, Baby Boomers 24% and the Greatest Generation filling the remaining 9% of U.S. population.

The younger generations are pioneers in technologies, and in the Internet Age there is a visible increase in technological dependence in all day-to-day activities, especially through smartphones (Zhitomirsky-Geffet & Blau, 2016). Mobile phones have become an indispensable part of modern life, whether for the purpose of communicating with others, for playful activities such as listening to music or for the purpose of entertainment and shopping (Lee et al, 2014; Ozkan & Solmaz, 2015; Zhitomirsky-Geffet & Blau, 2016). It is theorized that media planning should also move to these platforms to be able to connect with Gen Z, since they spend so much more time there and are more receptive to advertisements seen in mobile (Southgate, 2017).

According to Nielsen studies, younger generations have the highest smartphone penetration ever, reaching almost 100% (Nielsen, 2016). Generation Z had access to mobile technologies and smartphones from birth rendering them a vital and natural part of their existence (Zhitomirsky-Geffet & Blau, 2016). "Getting a phone is one of the most important life events for Gen Z. And they are younger than ever when they get them." (Google, 2016b, page 3). According to the Google report (Google, 2016b), most of today's teenagers had their first mobile phone at age 12 and 2 out of 3 teenagers shop online, with about half of those shopping through mobile phones. Mobile phones are the devices most used by this generational cohort.

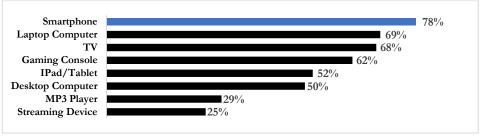


Figure 2 - Most Used Devices for 13- to 17-year-olds (Source: Google, 2016b)

According to the same report, smartphones are the main source of entertainment and communication with family and friends. The main activity for this generation is based on the visualization of videos and movies in the mobile phone, through platforms like YouTube. This generation also has a high connection to ecommerce, with 68% of adolescents shopping online and the device most used for this purpose also being mobile. The main purchase categories are video games, books and Apparel (clothing). Gen Z is particularly fascinated by shoes which for them is the currency of cool and the main focus of their attention within the category of clothes/fashion/beauty (Google, 2016a). Previous work done by Agante (2009) identified apparel and clothing product categories as favorites of youngsters, particularly brands such as Adidas, Nike and Zara (Agante, 2009). Although the research was not conducted for Gen Z, the respondents of the research were then roughly in the same age range as Gen Z is now.

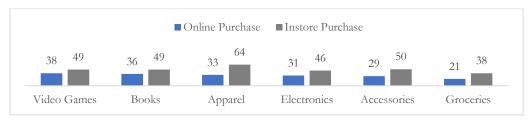


Figure 3 - Main purchase categories by 13-to-17-year-olds (Source: Google, 2016b)

The connection of this generation to brands is also disruptive. They seek to see actions that create a change in the world and brands focused on improving the lives of their customers and employees (Google, 2016a). The cool factor is very important for this generation and for something to be considered 'cool' it must have specific characteristics such as its uniqueness, interest and ability to impress. The influence of friends and advertising is also very big on the 'cool' factor of a product or brand (Google, 2016b). The impact of celebrities on Gen Z has also been identified, and they seem to have more positive feelings towards advertisement when featuring famous celebrities (Southgate, 2017).

3.2 Brand loyalty in Gen Z customers

Loyalty to brands by younger generations, specifically by Gen Z, is still an incipient topic in academic literature. This is a generation that needs to feel particularly connected "Gen Z craves connections with others - and not just in person" (Google, 2016b, page 3).

It is important to understand what motivates loyalty in childhood/adolescence, either by the child as a client, by the influence in the adults in his/her life, and also as a future client (Haryanto et al, 2016). Bidmon (2017) has identified the creation of positive emotional

connections with brands as the key antecedents to the development of brand loyalty. The new generation, through their digital connection, respond particularly well to digital touchpoints such as brand communities and advertising (Bidmon, 2017).

Haryanto, Moutinho, & Coelho (2016) identify the prominent place of brand trust and salience as antecedents of brand loyalty in children and youth. Brand salience is based on the ability of a brand / product to stand out from a variety of options, and is tied to the individual's ability to access long-term memory (Jraisat et al, 2015). The study carried out in three countries concludes with the importance of brands offering greater added value to their younger customers, in order to build an emotional connection based on authenticity (Haryanto et al., 2016). However, the authors leave open the question of whether the concept of brand loyalty exists in children or whether young people only show loyalty to product characteristics (Haryanto et al., 2016).

4. Relevance

The literature review presented above raises gaps that are felt in academic research in all topics covered. The advances of technology have made possible and needed the creation of new business models that are far ahead of academic research. The importance of the study of touchpoints in the current context of change and evolution, its impact on customer behavior in the purchasing path and in an integrated way becomes clear. Being able to identify and influence the drivers of customer's behavior remains one of the great challenges in marketing (Macdonald et al, 2012). It is also incipient the study of these impacts on younger generations, particularly from the brand loyalty point of view. The differentiating features of Gen Z and the increasingly digital world with the brands omnichannel integration makes it imperative to understand this new customer of the future.

As previously described, the disruption of businesses through new and innovative digital business models (Wind & Hays, 2016) creates a constant need to learn and to improve the value proposition offered to the customer. In this context, Gen Z will be the biggest challenge for companies yet as they are unlike any customers before them and expect great things from the brands they buy (Priporas et al., 2017). The focus on innovation, technology, relationships and social responsibility that Gen Z imposes on companies is very demanding (Google, 2016a). So, the question becomes, how to reach these customers and through which touchpoints can brands create long lasting relationships with them.

II. Research Questions and Methodology

The previous chapter presented the theoretical framework of the subjects addressed and the identification of the main contributions that this research could have. In this chapter, the study objectives will be presented, as well as, the methodology chosen to respond empirically to the issues raised.

1. Research Objective and Questions

The objective of this research, building on the gaps found in literature, is to understand Gen Z's customer journey with brands in order to identify the touchpoints they interact with, as well as, to provide an understanding of the customer profile and behavior Gen Z has towards brands. The exploratory nature of the research renders the insights achieved to be leads for future research more than definitive conclusions.

The managerial contribution of this study will be to provide insights on how to prepare businesses for the next generation of customers and to enable them [the managers] to manage and optimize their resources and touchpoints depending on the market. The study of touchpoint impact and profile of Gen Z are two topics that remain in their infancy in academic studies, therefore the theoretical contributions of this study are an initial understanding of the new customer profile of Gen Z and if brand loyalty is real for them, their path to purchase and the impact of different brand touchpoints with this new type of customers.

These objectives will be reflected in the following research questions:

- Who is the Gen Z customer and is he loyal to brands?
- What is Gen Z's customer journey?
- What are the most relevant touchpoints for Gen Z?

2. Ethical and Legal Issues

The UN Convention on the Rights of the Child (UNCRC) defines children as any human under 18 years old or less if the age of majority is attained earlier due to specific laws applied to the child (Unicef, 1989). Based on this definition, the International Ethical Research Involving Children Project was created by Unicef to ensure that the dignity of the children

involved or taking part in any research project is kept, as well as their rights and well-being are met. The proposed study ensured that the guidelines of the ERIC report are maintained and applied to all stages of the conducted research (Graham, 2013). For this, formal consents were obtained both from the children's legal guardians as their own. The legal guardians were asked to sign a written consent document and the children were informed verbally about their role in the study and that they were able to quit their participation at any moment. Standards of confidentiality and anonymity were upheld in all personal information gathered as to GDPR laws.

3. Methodology

3.1 Research Design

The research questions previously identified have a subjective character and seek to understand mainly the motivations and characteristics of the customer and their behavior towards the brand. As such, the qualitative methodology is the most viable option. However, the study of brand loyalty and touchpoints is addressed through the usage of a quantitative methodology. In this sense, it figures that a mixed methodology is the best and most thorough approach to an exploratory research as it is the case of the present work.

In the previous chapter, regarding the literature review, it is clear that the study of the impact of touchpoints and particularly, their place in Gen Z's path to purchase is still in its infancy. The purpose of this study is to understand motivations, customer behavior and map the customer journey, since these are very abstract constructs and focus on feelings and memories the qualitative methodology approach is more suitable to answer. Several studies that focus on similar objectives and look to motivations and behaviors also use qualitative approaches, mainly in depth interviews:

Authors Paper		Objective	Methodology	
Stein &	Towards the identification of	To identify the	Qualitative - In depth	
Ramaseshan	customer experience touchpoint	touchpoints	Interviews using	
(2016)	elements	encountered during the	sequential incident	
		customer journey	technique	
Priporas et	Generation Z customers'	Understanding the use	Qualitative - In depth	
al., (2017)	expectations of interactions in	of digital technologies	Interviews	
	smart retailing: A future agenda	and expectations for		
		the future		
Pantano &	The effect of mobile retailing	Understand the extent	Qualitative - In depth	
Priporas	on customers' purchasing	to which mobile	Interviews	
(2016)	experiences: A dynamic	technologies have an		
	perspective	impact on customer		
		behavior		

Andrews & Eade (2013)	Listening to Students: Customer Journey Mapping at Birmingham City University Library and	Map the customer journey of students in libraries	Qualitative - In depth Interviews	
	Learning Resources			
Uta et al., (2013)	Customer service experiences: Developing and applying a sequential incident laddering technique	Understanding the customer experience in services	Qualitative - In depth Interviews using sequential incident technique	

Table 3 - Summary of methodologies used in similar studies (Source: Own elaboration)

Therefore, because of the nature of this research, an exploratory study based on in-depth interviews figures as the most sustainable solution (Pantano & Priporas, 2016; Priporas et al., 2017; Stein & Ramaseshan, 2016). The in-depth interviews allow for collection of richer information and the exploration of feelings towards the touchpoints, viewpoints on the subjects and permits the research to have a fuller understanding of the questions and be able to identify and comprehend the phenomena and the attitude (Marilyn & Chad, 2000; Maxwell, 2008). Also, the study of children's/teenager's feelings and motivations is aided with a qualitative methodology because it overcomes a difficulty of understanding and expressing opinions and feelings (Kamila & Květa, 2017).

Therefore, the first and second research question [Who is the Gen Z customer and is he loyal to brands?; What is Gen Z's customer journey?] will be answered trough the qualitative research and the brand loyalty questionnaire that is part of the RET method, a Real Time Experience Tracking methodology later explained in this chapter. The respondents will allow for the mapping of their journey, the touchpoints encountered in each stage of the path and the contribution they had on the purchase outcome. This approach is based on the study on the identification of customer experience touchpoint elements conducted by Stein and Ramaseshan (Stein & Ramaseshan, 2016).

The third research question [What are the most relevant touchpoints for Gen Z?] aims to discover the touchpoints encountered by Gen Z and their significance for the customers. The methodology used to answer this question is inspired by Real-Time Experience Tracking (RET) technique used to assess the impact of customer touchpoints on brand consideration (Baxendale et al., 2015). The product category chosen [sports shoes] was based on the favorite products for Gen Z presented in the previous chapter and corroborated by the favorite and last purchased products and brands assessed during the interviews. The technique and how it was used will be further explained in this chapter. The study of touchpoint impact is a fairly recent approach to customer behavior and, as such, there is not a very wide representation of similar studies in academic literature. Although the academic

background is scarce, businesses have been very interested in this area and research companies developed the RET technique to provide answers on customer behavior and actionable insights for brands. This technique presents itself as a best practice for the study as it can overcome certain flaws found in other methodologies relating to call of memory from the respondents. Memory can fade over time or be influenced by the current context of the respondent or other situation that may have occurred since. The RET technique overcomes this flaw as it relies on immediate feedback and it doesn't intrude in the interactions with the brand (Macdonald et al., 2012).

The Real Time Experience Tracking Technique is a marketing research technique from MESH (a market research company focused on experience) that aims to accurately understand the customers' emotional response to an experience. The method uses mobile phone for immediate response, that is, respondents report information at the exact moment they are encountering the touch-point, and do so through their mobile phone. This technique was born out of two insights: on the customer side it is natural that during the course of the day there are several interactions with brands and it is not possible for a researcher to be present to study each one. On the business side, it was understood that although there are a great amount of different interactions between brands and customers, the real information needed to understand their impact on the brands involved is the touchpoint experienced, how the customer felt about it and how persuasive it was (Macdonald et al., 2012).

The data collection technique means to mimic customers' natural interaction in social groups – sharing short forms of communication about the occurrences in their lives and gain more insightful information for it (Baxendale et al., 2015; Macdonald et al., 2012). This technique was used in a 2015 study on the impact of touchpoints on brand consideration (Baxendale et al., 2015). The study used a panel of several thousand respondents and tested 4 models on the relationship of the variables. Hence the large number of respondents is not a possibility for this research, the analysis of this methodology was adapted and simplified, but the experiment's procedure was conducted in full.

The collected data does not only allow to answer the second question but lead to some empirical evidence that helps build a profile for the Gen Z customer when paired with the results of the qualitative portion of the research. The data provides insights regarding the key drivers that correlate with individual customer behaviors, competitive analysis between brands concerning the touchpoints they have and the chain of touchpoints the customer might find of a certain brand that leads to a store visit or purchase.

The population under study are all individuals belonging to generation Z, with a previously defined age range between 12 to 18 years (Puiu, 2016). In-depth interviews were conducted with respondents of all of the age range and both with male and female adolescents. The data was collected during the months of June and July of 2018.

3.2 Sample

The sample for the qualitative portion of the study – the in-depth interviews, was composed of 35 Portuguese children and adolescents of Gen Z. As previously stated in the literature review the age range of Gen Z has no consensus in the academic world, there for the range chosen was between the ages of 12 and 18 years old. The interviews were conducted with 35 children and adolescents, from both genders: male and female. The children were part of a Scouts association in Porto chosen to be the place of study hence it gathered different cultures and social classes has a way to overcome economical bias.

The sample for the quantitative portion of the study – the RET Technique, was the same of the qualitative study and included the ones that wanted to continue for the second part of the study. Consent forms were issued for 35 parents and all the consents were received. Although the parents have allowed for full participation, only 30 participants wanted to continue with the RET technique.

Age / Gender	12	13	14	15	16	17	18	total
Feminine	3	4	2	3	3	2	4	21
Masculine	3	3	3	2	0	3	0	14
Total	6	7	5	5	3	5	4	35

Table 4 - Sample distribution in Age and Gender

3.3 Procedure

Pre-Test

Before the interviews were conducted, the questions on the interview guide and survey for the RET experiment were pre-tested with 4 respondents from Gen Z. The main goal of the pre-test was to aid the construction and structure of the questions and to ensure the topics questioned were relevant and explained in an understandable language (Haryanto et al., 2016). During the pre-test the 4 respondents were interviewed, one at a time and the brand loyalty questionnaire was filled regarding three trainers brands. Then the RET experiment was tested, and, it was requested that during the following days the respondents informed the researcher through instant messaging service of each time brand touchpoint was encountered with the place and positivity associated to it. Every two days, the

respondents were asked to fill out the diary allowing for further elaboration on the touchpoints encountered and at the end of the week the survey on brand loyalty was resent to answer.

The methodological instruments and procedures were adapted according to the results of the pre-test. These revisions consisted on minor changes regarding the order and syntax of the questions.

In-depth Interviews

Firstly, the responsible members of the Scouts Association were contacted about the research and the study was presented in a document requesting authorization (Attachment 5 – Authorization request to Scouts Association). Upon acceptance by the association, the parents of the respondents were contacted and a consent form was sent (Attachment 4 – Consent form for parents), the consent explained the study's purpose and the participatory role of the respondents.

After receiving the consent forms signed from the parents, the respondents were interviewed individually being these in-depth interviews conducted in the Scouts Association facilities. The researcher started by presenting the study, and it was made clear that the respondents were able to quit the study at any time if they wished. The interview followed the proposed script (Attachment 1 - In-depth Interview Script) and had a duration of about 15 minutes. The interviews were recorded in full for later analysis. The respondents then answered the brand loyalty questionnaire. At the end of the interviews the next step of the study – RET experiment, was explained in full detail.

RET Study

The RET study began on the day after the interview, the respondents were briefed on the process of the study and their tasks and responded to a questionnaire regarding brand loyalty (Attachment 2 – Questionnaire). Both for the questionnaire and the RET method the participants were asked to choose their favorite three brands of trainers to use in the research. It was important not to have a time gap since the interviews and explanation of the study and the RET so that the respondents would not lose interest in the study or forget the procedure.

The experiment happened for seven consecutive days. The respondents were asked to send a coded text message to the researcher via Whatsapp or text message every time they encountered a touchpoint concerning any one of the defined brands. The coding informed about the brand, the touchpoint and the positivity felt towards it. The coding is present on the explanation on the RET technique, included later in the methodology chapter. The communications platform was chosen due to the respondents' habituation with it and easiness of use.

Every two days a diary report (Attachment 3 - Diary Example) was sent to the respondents via mobile phone so they could explore more on the information previously given. The diary had a summary of every touchpoint encountered by that respondent and for each the respondent could add more information although it was not mandatory to reply. The purpose of the diary report was to retrieve more detail on the encounter, if the touchpoint belong to the brand or a retailer, how long was the duration of contact, if it was seen organically or showed by another person.

At the end of the study, the same questionnaire filled in the beginning of the study was sent via mobile phone regarding brand loyalty to measure possible changes. The respondents were not so collaborative with answering the second questionnaire, and as it was not done in person, and therefore no respondent sent the questionnaire back.

4. Exploratory Study

As explained before, the exploratory study comprehends the conduction of in-depth interviews with Gen Z. Based on the research questions and literature review a script was created for the interview process comprising the main subjects of the investigation.

The first moment of inquiry was regarding demographic and characterization questions. This first moment needed to provide not only information on gender, age and location, but the characteristics of the subject regarding shopping behavior, use of technologies, interests and values.

The second part of the interview focus on the research question about the customer journey – "What is Gen Z's customer journey?".

The purpose of this portion of the interview was to help map out the path Gen Z takes to make a purchase. The starting point of the mapping was based on the classic customer journey presented in the literature, which encloses three big steps – Pre-Purchase (Search and Evaluation), Purchase and Post-Purchase, as revised in the literature review presented earlier. One of the used techniques to help mapping the customer journey is the use of scenarios to trigger the outcomes most likely to happen and guide the user (Andrews & Eade,

2013). Based on the study of Stein (2016), the sequential incident technique was used. This is a process-oriented qualitative interview technique to help understand and classify the perceived occurrences and effects identified by the respondents (Uta et al, 2013). This technique uses a story telling approach that permits the respondents to recall and describe the occurrences.

The respondents were guided through their customer journey episode using an illustrative image of the path to purchase (Figure 5) and were asked to remember and describe with full detail each step/interaction and their feelings about it (Gremler, 2004). The adoption of this technique was employed to capture the dynamic and subjective nature of the customer experience (Stein & Ramaseshan, 2016). The number of in-depth interviews was defined by the reach of the point of saturation as described in the literature as the moment that no new information is generated (Guest et al, 2006).

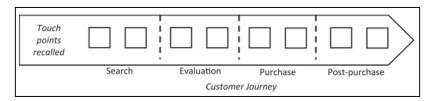


Figure 4 - Illustrative image of the path to purchase (source: Stein & Ramaseshan, 2016)

A series of questions were asked regarding each step, in order to understand in full detail every decision and reasoning behind it. The full interview script can be found in Attachment 1 (Attachment 1 - In-depth Interview Script).

5. Real Time Experience Tracking (RET)

The purpose for the use of this methodology was the ability to read real time consideration on touchpoints and understand what the most seen touchpoints by Gen Z were. This information does not only measure positivity towards the touchpoint but also in which media/place the customers are more present and noticeable.

On Baxendale's study (Baxendale et al., 2015), the subjects responded to a survey at the start of the experiment on brand consideration. In this adaptation, the same procedure was used but other constructs were added. Our survey measured brand loyalty, while in the original study the authors measured brand cosideration (Baxendale et al., 2015). The choice for this adaptation comes from the different constructs being studied on the present research. After the survey, the respondents were given the RET coding for consultation. During the 7 days of the study they had to report the encounters and their positivity towards

them via a coded text message and every two days they received a diary (Attachment 3 - Diary Example) to elaborate on the encounters. Every report they made was available for them to see. The respondents that were not actively participating received a push message for participation every two days instead of the diary, the push only asked if any touchpoint had been seen: "Hi XXX, Can you please let me know if you saw any touchpoint belonging to the previously defined trainers' brands? Thanks". The product category used was chosen based on the generational preferences taken from the interviews and the three brands were chosen by each participant. The touchpoints build from the ones used on the previous study of touchpoint impact (Baxendale et al., 2015) and updated based on the literature review and the interviews previously conducted.

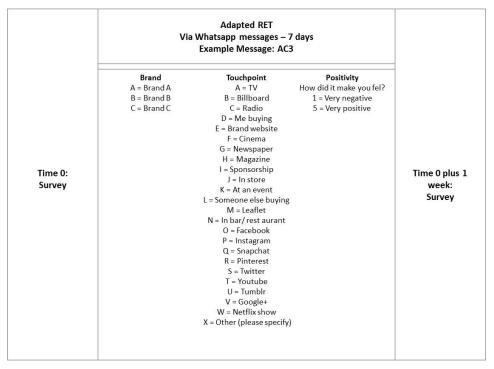


Figure 5 - Study design and coding reference (source: own elaboration)

6. Measuring Scales

The measurement scales used in this research were theoretically supported and tested in other scientific studies. In the questionnaire the variables used were Brand Loyalty (both attitudinal and behavioral). Brand Loyalty was measured using a 9-item, 7-point Likert-scale, adapted from the works of Chaudhuri and Holbrook (2001), Carroll and Ahuvia (2006) and Yu, et al (2017), (Carroll & Ahuvia, 2006; Chaudhuri & Holbrook, 2001; Yu, Cho, & Johnson,

2017). The respondents were asked to indicate the level of agreement with the sentences showed choosing from 1 – Strongly Disagree to 7 – Strongly agree.

On the RET the variables used were Positivity and Frequency. Positivity was measured using a one item Likert-scale on a 5-point scale adapted from McFarland and Buehler (1998) (McFarland & Buehler, 1998). Positivity can be defined as a real-time affective response (Aaker et al, 2008) similar to the Attitude Towards the Ad Model most used in academic research that is defined as "a predisposition to respond in a favorable or unfavorable manner to a particular advertising stimulus during a particular exposure occasion" (Lutz, 1985). Frequency was calculated on a basis of counting the touchpoints encountered of each type.

The questions were carefully translated to the native language of the respondents and structured into a questionnaire (Attachment 2 – Questionnaire).

Brand Loyalty

- L1 I think of myself as a loyal buyer of this brand.
- L2 I will buy this brand the next time I buy this kind of product
- L3 I intend to keep purchasing this brand
- L4 I am committed to this brand
- L5 I would be willing to pay a higher price for this brand over other brands
- L6 This is the only brand of this type of product that I will buy
- L7 When I go shopping, I don't even notice competing brands
- L8 If my store is out of this brand, I'll postpone buying or go to another store
- L9 I would rather stick with this brand than try other brands I am not sure of.

Source: Chaudhuri and Holbrook (2001), Carroll and Ahuvia (2006) and Yu, et al (2017)

Positivity

How did it make you feel about the brand?

Source: McFarland and Buehler (1998)

Table 5 - Measuring scales (Source: Own elaboration)

A Reliability Analysis was performed on the Brand Loyalty Scale using the Cronbachs' Alpha model to ensure internal consistency, based on the average inter-item correlation to ensure proper analysis. The internal consistency of a scale designates to which extent all the items present measure the same construct (Malhotra, 2009). The coefficient normally ranges from 0 to 1, meaning that if all the scale items are entirely independent of one another (correlated or share no covariance), then $\alpha = 0$; and, if all the items have high covariance's, then α will approach 1. The commonly accepted minimum value alpha should be 0,7 (Hair et al, 2010). The Brand Loyalty construct was analyzed using the Cronbachs' Reliability model and internal consistency was conformed with an alpha value of 0,8.

Cronbachs' Alpha	N. of items
.800	9

Table 6 - Cronbach's Alpha (Source: Own elaboration on SPSS)

7. Data Analysis

In this section the methodological considerations for analyzing the collected data are explained.

7.1 Qualitative data

The purpose of the qualitative portion of the research was to map the customer journey, identify the most relevant touchpoints encountered and profile the Gen Z customer. To do so, an inductive analysis was performed based on the responses obtained.

The interviews were fully and verbatim transcribed using a voice typing tool in google docs. The researcher heard the interviews with headphones and dictated the answers to the activated software. During this process the researcher made corrections to faults in transcription from the tool. The transcriptions were analyzed using a qualitative analysis software from R version 3.5.0 (2018-04-23) with the package RQDA: Qualitative Data Analysis version 0.3-1 2018.

A profile characterization was achieved through the categorization of typical behaviors and preferences retrieved from the first portion of the interviews. The information was mapped and later added to other data sources of the participants for an integrated analysis.

An analytical inductive process was used to work from the answers provided by each respondent to identify and code themes related to generational profile and customer journey. The coding and theory development was conducted using a framework analysis of the data consisting of several stages: familiarization with the interview, identification of a thematic framework, coding, charting, mapping and interpreting of codes.

The framework analysis belongs to thematic analysis methodology, it consists in constructing a set of codes and organizing them into a set of categories clustered by similar concepts. A preliminary analysis of the data is conducted to identify the main concepts and codes. The analytical framework is developed from the codes that are then organized into categories using a tree-like structure and defining each one. The analytics framework is applied to all the data sets using the RQDA software as previously mentioned. The data is then charted into a matrix to help interpretation (Gale et al, 2013). After the framework analysis was conducted, a descriptive statistical analysis was created with RQDA software, also for interpretation purposes.

7.2 Quantitative data

The quantitative data collected was obtained from a questionnaire enclosed in the first portion of the RET technique that measured the Brand Loyalty of each participant to three sport shoes brands chosen by the participants, and the results obtained from the RET technique. From these two data sources, two databases were created for further analysis combining information from all the data collection. The analysis of this data was performed using IBM SPSS Statistics software analysis package Release 24.0.0.0 64-bit edition. On both databases a primary descriptive statistical analysis was performed.

The research conducted was carried out to understand Gen Z' behavior and attitudes towards digital usage and brand loyalty. The Brand Loyalty Database contained the answers on Brand Loyalty given by respondents. For each participant an average was calculated for each item in the Brand Loyalty scale, and for each participant/brand a new variable was created containing a Loyalty Index calculated by summing up the variables of Brand Loyalty. To this data base all the profile variables were included for analysis as well as a variable concerning the respondents' participation in the RET Technique. The Age variable and the Brand Loyalty variables were recoded for analysis.

Brand Loyalty Scale Recoded			Age Recoded			
Likert Scale	1-2	3-5	6-7	Age	12-15	16-18
Recoding	1 - low	2 - mid	3 - high	Recoding	1 - younger	2 - older
Table 7 - Variables recoding (Source: Own elaboration)						

The Chi-Square test is used to test the independence between two qualitative variables, it assesses if the frequency to which the sample splits between classes of a qualitative variable if random or not (Marôco, 2014). The brand loyalty recoded and profile information gathered was analyzed using Chi-Square testing in order to understand if the answers on brand loyalty and profile were independent of the variables Age recoded and Gender. To the same effect a Mann-Whitney test was performed to understand if the variables Age recoded and Gender had any impact in the variables concerning brand loyalty. The Mann-Whitney is a non-parametric test used to compare the distribution functions of a variable between two independent samples, this test figures as an alternative to the mostly used T-Student Test for independent Samples when the assumptions of normality and/or sample size are not verified which occurs in very small samples and in ordinal variables (Marôco, 2014) as it is the case of this research.

In order to further explore the profile database acquired, a clustering analysis was attempted to provide insights on aggregating behaviors characteristics to lead future researches on Gen Z segmentation possibilities. The clustering analysis was performed using the software R: A language and environment for statistical with the 'Cluster' package and Daisy function. The Daisy function computes all the pairwise dissimilarities (distances) between observations in the data set, allowing for mixed type variables as the qualitative variables obtained in the present research to achieve segmentation of the data base with clustering.

7.3 RET Technique

In order to evaluate the data collected in the RET technique, and considering the innovative nature of the method and lack of similar studies, it was decided to analyze the data using a Kruskal-Wallis test. To assess if the Positivity (ranging from a scale of 1 – Very Negative to 5 – Very Positive) of the touchpoint reported was significantly influenced by the touchpoint itself or the Brand seen a Kruskal-Wallis non-parametric test was performed (Marôco, 2014).

The active participation in the RET portion of this research was also analyzed, in an attempt to understand what motivated or demotivated the respondents to participate. The Logistics Regression analysis was performed as an attempt to reach conclusions in this subject but no statistical significant results were achieved. To the same effect, the Discriminant stepwise Analysis was used to identify witch study variables allowed a significant differentiation of the two groups of participation (Active participation and non-participation). The Discriminant Analysis is a multivariate statistical technique which main purposes are to identify the variables that differentiate between two or more groups of structurally different and mutually exclusive individuals. The usage of the variables identified allow for the development of a discriminant function to represent the group differences and permits the a priori classification new individuals in the groups (Marôco, 2014).

III. Empirical Study

1. Results

The following section will present the main results found in the research analysis. As previously mentioned, three data sources were used: in-depth interview transcripts, Brand Loyalty questionnaire and RET method. Information from all data sources was combined for analysis. The results are divided between the outcomes from the qualitative research, the results obtained in the analysis of Brand Loyalty database and results from the analysis of RET data.

1.1 In-depth Interviews

The analysis conducted on the qualitative research allowed for identification of respondent's profile characteristics that were later aggregated to other data sources for analysis. The information retrieved consisted of the following profile dimensions:

P 1	Participation in RET	
P2	Participation Pushed	
P3	Hobbies: Sports	20
P4	Hobbies: Arts	13
P5	Hobbies: Shopping	2
P6	Hobbies: Travel	4
P 7	Hobbies: Gaming	7
P8	Electronic Devices: Mobile	35
P9	Electronic Devices: Computer	21
P10	Electronic Devices: Tablet	14
P11	Electronic Devices: TV	22
P12	Electronic Devices: Video Game Console	8
P13	Electronic Devices: Camera	3
P14	Media: TV	27
P15	Media: Magazines	5
P16	Media: Newspapers	4
P17	Media: Netflix	5
P18	Social Networks: Instagram	31
P19	Social Networks: Facebook	20
P20	Social Networks: Twitter	6
P21	Social Networks: Snapchat	11
P22	Social Networks: Whatsapp	22

P23	Social Networks: Messenger	12
P24	Social Networks: Twitch	2
P25	Social Networks: Musica.ly	1
P26	Social Networks: Youtube	9
P27	Favorite Products: Trainers	25
P28	Favorite Products: Clothes	18
P29	Favorite Products: Tech	7
P30	Favorite Products: Beauty	2
P31	Last Purchase: Trainers	10
P32	Last Purchase: Clothes	15
P33	Last Purchase: Tech	6
P34	Online Purchase	13 Yes 22 No
P35	Most Used Device	19 Smartphone 3 Video Games 1 PC
P36	Payment: Paypal	1
P37	Payment: Credit Card	3
P38	Payment: ATM	6
P39	Payment: Handled by Parents	23
	Table 8 - Profile dimensions and occurre	ences (Source: Own elaboration based on interviews)
		·

The profile dimensions stated before were developed based on the most occurring possibilities of each type of inquiry. The main leisure activities stated by the respondents as favorite were playing sports (57%), artistic endeavors (37%) and game playing (20%). As for electronic devices, all participants had a smartphone and more than 50% had computer and tablet as well, with other devices being not so standard. In spite of the digital attachment, most of the respondents (63%) had not made online purchases. The smartphone demonstrated to be the most used device for many respondents that claim to use it for all digital activities and for entertainment purposes, including school work "I use my smartphone...to do homework, since I don't have a computer I just use the phone." (girl, 15). Regarding media usage, the respondents mainly watch television (77%), although not for very long periods of time. Printed media however seems to be scarce in use for the respondents (average of only 13%). When it comes to social networks Instagram (89%) and Whatsapp (63%) lead the way followed by Facebook (57%), Messenger (34%) and Youtube (26%). As for favorite products and last purchases the categories are consistent, although the favorite is by far trainers (71%). Lastly, on the subject of payments and financial matters, most of the respondents are not in control yet due to their young age (in x% of the cases the payment is handled by their parents). The few that already have a say in the matter prefer more conservative ways using only debit or credit cards in standard accounts.

The respondents were also asked about their favorite brands. Out of the 35 participants 136 brands were named in total with 48 unique occurrences. The top 10 Brands nominated accounted for 65% of the total of preferences. The first two brands were Adidas and Nike closely followed by Zara and Pull and Bear.

Brand	#	%
Adidas	23	17%
Nike	18	13%
Zara	12	9%
PullandBear	11	8%
Bershka	8	6%
Primark	6	4%
Tiffosi	4	3%
Levi's	3	2%
Razor	2	1%
SportZone	2	1%

Table 9 - Top 10 favorite brands (Source: Own elaboration)

The analysis allowed for the identification of two main information groups. The first concerned motivators and behavior of Gen Z about digital usage, brand loyalty and purchasing behavior. The second group belonging to the customer journey taken by Gen Z obtained from the sequential incident technique used in the interview process. Both groups were categorized and coded for analysis.

The analysis resulted in 5 different categories for behaviors and motivators mostly mentioned by Gen Z participants.

Category	Definition	
Social Network Usage	The main motivations and usages the participants mentioned about social	
<u> </u>	network usage.	
Loyalty and	Product and brand characteristics mostly mentioned as a motive for	
Recommendation	repurchase and recommendation of a product.	
Motivation for online	Main reasons for online purchase.	
purchase	•	
Motivation for offline	Main reasons for offline purchase, including reasons for not buying online.	
purchase		
Online Shopping	Participants' behavior concerning online stores.	
Behavior	•	
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Table 10 - Behavior and motivation categories (Source: Own elaboration)

The five categories previously defined were untangled in 17 codes used to map the possible answers provided. The coding and categorization aimed at better understanding Gen Z's motivations for digital usage, shopping preferences and brand relations.

Category	Code	Example
Social Network	Socializing	"I post photos and see what other people's photos,
usage		sometimes they send me stuff as well."
	Communication	"It's an easier way to communicate with my friends
	Follow celebrities	"I used it to keep updated with my friends and
		celebrities I like"
	Enter contests	"To enter contests and comment, but the contests are
		what I most interact with."
Loyalty and	Product Quality	"The product quality is great, that's why I go there so
recommendation		many times."
	Brand trust	"Because I've tried it and I know the brands' reality."
	Design	"It goes with the product design, even if they are quality
		products, if the design is not the most appealing I don't
		think it works."
	Durability	"I'll not spend money in something that will get ruined
		in no time."
Motivations for	Easiness of purchase	"It's a lot more practical and you don't have to stay in
online purchase		lines like in Zara."
	Less expensive	"Products in stores are more expensive, when you order
		it's cheaper and the quality is similar."
Motivations for	Parents decision	"I don't buy (online) because my parents don't really
offline purchase		like doing shopping online."
	Orders may not arrive	"If you shop online even in a known brand the order
		may never arrive and be a fake purchase so I'm afraid of
		buying."
	Products may be	"Sometimes the fabric is not the same as in the pictures,
	misleading	sometimes I see things online and when I get to the
		store it's not the same."
	Physical purchase as a	"I enjoy going to the stores and try things out right
	leisure and social	away."
	activity	
Online shopping	Regularly visits websites	"I mostly purchase in physical stores but I think online
behavior		is a source of inspiration and in some way a source of
		enlightenment because I don't just buy from what I see
		in stores."

Table 11 - Behavior and motivation categories extended (Source: Own elaboration)

Social Networks Usage

The digital usage of social networks and online purchasing is quite differentiated for this generation. On average the respondents used roughly 3 different social networks, with some stating to use up to 6 different social networks. The mostly used is by far Instagram with 89% usage, which is aligned with the RET Technique results due to a large majority of touchpoint sightings occurring on this platform. The respondents claim to be active users in the platform: posting pictures and stories, interacting with other users and using the Direct function for instant messaging. Although Whatsapp was stated as the second most used social network, is indeed an instant messing service. Therefore, Facebook follows Instagram as the second most used social network. However, seems to have a very low engagement

with the respondents, who claimed only to use it for specific and timely cases, as supported by the following statements:

- "Facebook is more useful to see people's birthdays and for group events like in the Scouts or Basketball groups" (girl, 15)
- > "My Facebook account is inactive, I never use it" (boy, 13)
- > "I only have Facebook now because I already had it" (girl, 18)
- > "I only use Facebook because my family has it, instead of Instagram, so I have to use it, otherwise they'll be sad" (girl, 17)

Social Networks	Respondents		
Instagram	89%		
Whatsapp	63%		
Facebook	57%		
Messenger	34%		

Table 12 - Top 4 Social networks used (Source: Own elaboration)

The motivations for using social media fall mainly in four overlapping categories. Communication and socialization are the main focus of usage but the respondents also stated to be interested in following celebrities: "I'm usually interested in seeing my favorite [sports] players and I like to see when they advertise brands." (girl, 16); "I use social networks to keep updated on my friends and celebrities I like, if I've seen them in a movie and like them, I start to follow them [on social media]." (girl, 13); "I also follow brand ambassadors that are always advertising things" (girl, 15). Another mainly stated usage pertains to participation in brand contests: "I am there [in social networks] to enter contests and comment stuff, but contests make me interact more" (boy, 14); "I sometimes share when brands have contests, I go on brand pages to check if there are contests to enter" (boy, 17).

Loyalty and Recommendations Motivators

The Brand Loyalty perception and recommendation reasons for Gen Z seem to be mostly connected to product characteristics, mainly the product quality but the aesthetics and durability as well. One other reason stated was Brand Trust, which pertains to feeling of security and preference towards a specific brand despite of the products characteristics: "The brand itself incentives people to buy [its products]" (boy, 14). These findings are aligned with the research conducted by Haryanto, Moutinho, & Coelho (2016) that theorized that young

people not only show loyalty to product characteristics and included brand trust has an antecedent of brand loyalty (Haryanto et al., 2016).

Purchasing Behavior

Online shopping seems to be a different reality for this generation as well, although they are constantly connected, each respondent stated to have a mobile phone and 54% claimed to be their most used device. Yet, they are still very reluctant to shop online, and only 37% have previously done it. In the interviews three main categories arose regarding this phenomena, the first gathered the motives for online purchase, the second the reasons for offline purchase and the third concern to the regular visits to the retailers' websites even though there was no intention to purchase online. The participants that had purchased online mentioned that the reasons were the easiness of the purchase and the products were less expensive "In Worten [Portuguese physical retailer] is a lot more expensive and of course I prefer things to be cheaper" (boy, 12).

Not pertaining to one of the previously defined motivators of online purchasing, during the customer journey narrated by one of the respondents, she mentioned to have made her purchase online because in the physical store the employees were not helpful and the product variety was scarce so she decided to buy on the brands' website: "I saw [in the store] a blazer the employee was wearing, because they use the brands clothes, and I had not seen it on display and I liked it a lot but they said they didn't have it in the store and couldn't get it. That same day, when I got home I looked through their online store, found the blazer and it had my size available so I bought it" (girl, 17). As mentioned by Stein (2016) and supported by Brady and Joseph Cronin (2011) "customer interactions with employees of the retailer are an important aspect of the customers' encounter at different touchpoints" (K. Brady & Cronin. Jr, 2001). The touchpoint encountered had a significant effect on the purchase outcome and on the customer satisfaction.

On the other hand, the motivators for offline purchasing are closely connected to the online perception. The interviewees are all underage and dependents of guardians, so one of the reasons mentioned was the parents' decision on the subject. The motivators also include the risk perception of online purchasing with respondents mentioning that orders don't arrive "I'm not sure if things come, I hope they do but I'm always afraid" (girl, 15); and that products are different than what they see or that the sizes are wrong "I rather have the product [in my hands] to see if they're real and the quality is good" (girl, 13); "I've never

bought online because the product can arrive hacked or broken. I don't think I'll buy online, only in stores" (boy, 13). The only reason stated to buy in physical stores that was not related to mistrust of online was the richer purchasing experience. The act of shopping is seen as a leisure and social activity being done for fun and with friends: "I wouldn't mind to buy online but I always like to go to the stores" (girl, 13); "I much rather go to the mall and be there physically" (girl, 18); "I rather go to stores and try things right away" (girl, 16).

Independently of their purchase habits or intentions being for online or offline methods, almost 60% of respondents stated to regularly visit online stores, particularly before purchasing: "I usually look online before going to the stores and this way I already have a notion of what I'll find." (girl, 18); "I always look online before, especially with trainers, I always go to Sportzone's website to check out the models they have and when I go to the store to buy I already decided what I'll buy" (boy, 13).

Customer Journey

The customer journey was mapped accordingly to the previously mentioned theoretical assumptions based on the classic customer journey. For Gen Z five categories were found as predominant in their journey narrative with main focus on the search stage on the customer journey experience.

Category	Definition
Research Channel Where the participants researched before purchasing.	
Research Type	Intensity of search before purchase.
Researched Brands	Brand consideration in research process.
Evaluation	Factors impacting the evaluation stage.
Post Purchase Behavior	Actions about sharing the purchased item.

Table 13 - Customer Journey categories (Source: Own elaboration)

Breaking down the five categories defined, 12 coding possibilities arose from the analysis that allowed for better understanding of the purchasing path made by Gen Z.

Category	Code	Example
Research	Online	"I went to the websites to have sort of an idea of what I
Channel		wanted."
	Offline	"I just went to the store, I didn't search anything else before,
		I just went to the mall."
Research type	rch type Exhaustive "It took me a while because I wanted to do a good purc	
	Superfluous	"I went to the store to see what they had and I liked the
		jacket."
Researched	Multibrand	"I searched in several websites and stores, online and close to
Brands		home."
	Pre-selected brands	"First I searched in a website my friend recommended but
		they didn't have what I wanted so I went to the website of
		the store."

	Only brand	"I went to the store, Calzedonia, because I always like to buy my bikinis there, I always shop there."
Evaluation	Recommendations	"I ask my friends opinions about games, when I bought Call of Duty I asked for their opinions and they told me it was a great game and that's why I bought it".
	Price Comparison	"I searched to see what store has the best price for the same model."
	Product Specs	"I got informed about the product specifications so I could see what aspects I was more interested in."
Post purchase behavior	Social Network sharing	"I posted it to social networks, the day I got it I took a picture to the box and captioned it with "Finally!"."
	Commenting offline	"After I purchased it I asked some people their opinion to see if I looked good in it."

Table 14 - Customer Journey categories extended (Source: Own elaboration)

Research Stage

The research stage proved to be one of the respondents' main focus in the purchase narrative. Most purchases started off with a well thought out search stage that navigated between online and in store search to find the best suited product to acquire, "I first started to look at models in the people I saw, to see how it looked, then I went to Zara but in the end it had to be in a specific Zara because the others didn't have the one I bought. I also looked online is several sites of brands like Zara, such as Bershka and Stradivarius." (girl, 15); "I searched in several websites and stores, both online and close to home" (boy, 17). Despite having a more exhaustive or superfluous search, the care in choosing the product was clear across narratives "I already knew I was going to have this event so about three weeks before I started to really think carefully about what I wanted to wear" (girl, 17); "It took a while because I wanted it to be a good purchase" (girl, 15) "I already had a pair of the same model but they were a bit old so I decided to get new ones. I started by searching online the different colors they had and by searching for my size" (boy,14).

The research also had specific characteristics depending on whether the search was considering only the product characteristics, or if the respondents only searched between a pre-designated set of brands or if the search was done only on one specific brand. Only 6 cases included a wide search for product without brand bias; "I've searched in different websites to find the best product I could afford" (boy, 15). The majority of narratives described the search to occur with specific groups of brands being considered: "I've considered 3 phone models – Huawei P10 Lite, the one I end up buying, Samsung A5 and Samsung A7 and I did the search between those three possibilities but I wanted one that had the specifications I liked with an affordable price" (boy, 17). In contrast, a few narratives made clear that only one brand was considered for purchase and the search was done in

different products belonging to that brand: "I always buy that same brand because it's a quality brand in running and I trust the brand so I basically only consider that brand when it comes to sports" (boy, 15).

Evaluation Stage

The evaluation stage of the descriptions focused on three main components: Product Specifications, Price Comparisons and Recommendations. Over 50% of the respondents listed Recommendations as a main decision factor in the evaluation stage, they described asking for friends and family's opinion about products and buying something as a result: "I sent the print [screen] to all my friends, my sister and my mother" (girl, 17); "I sent it [links of products] so they [my friends] evaluate because they're more experienced than me in computers and they are trying to come up with the best solution" (boy, 17). One of the participants' mentioned that a friend used a poll feature in Instagram - InstaStories to make a decision on what product to purchase: "I had a friend that once did a poll on Instagram, he wanted to buy a pair of trainers and was undecided between two models so he posted it to Instagram. I liked one better so I voted for that one".

Post Purchase Behavior

Regarding post purchase behavior two possibilities arose. Respondents either mentioned online posting of their purchases or offline commenting about the new products. The online posting was scarce in comparison to the offline possibility. Only 5 respondents described this type of behavior: "I posted a picture [of my new trainers] to Instagram after buying them and got a lot of comments saying how pretty the trainers were" (girl, 15). Many more claimed to have discussed the purchase in personal situations, when they first used the product to know how friends and family felt about it. One of the situations mentioned was regarding training equipment in sports activities, the respondents talked about the products with their sports teams and discussed product details: "After I bought them [the trainers] I told my tracking team about it, we have almost the same models and we usually discuss it a lot" (boy, 13); "I told my volleyball friends about it [the purchase]" (girl, 22). Despite being deeply connected with social media, Gen Z does not seem to be so forthcoming about sharing publications regarding purchases.

The descriptive analysis performed on RQDA can be found in Attachment 6 including a count on the number of codings for each code, the average number of characters for each code and de number of files associated with each code.

1.2 Age and Gender moderator impact

The main goal of the present work is to understand Gen Z' behavior and attitudes towards digital usage and brand loyalty. To assess the existence of any association between brand loyalty or any demographic profile characteristics (Age or Gender), the Chi-Square and Mann-Whitney tests were used, only with brand loyalty variables. As described in Marôco (2014) the statistical error of type I (α =0.05), also known as statistical significance of the test, was considered in all inferential analysis. If the proof-value (*p-value*) < statistical significance (α), then the null hypothesis (independence, in the case of the Chi-Square Test) must be rejected. Otherwise, no conclusions can be withdrawn.

The following tables present the results of the tests where it was found a significant association with the demographic variable being tested.

Variables	Hypothesis	p-value	Decision
Age * L4 - I am committed to this	H0: The variables are independent	0.006	Reject H0
brand	H1: The variables are not independent		
Age * L7 - When I go shopping, I	H0: The variables are independent	0.007	Reject H0
don't even notice competing brands	H1: The variables are not independent		
Age * P19 - Social Networks:	H0: The variables are independent	0.024	Reject H0
Facebook	H1: The variables are not independent		
Age * P38 - Payment: ATM	H0: The variables are independent	≈0.000	Reject H0
	H1: The variables are not independent		
Age * P39 - Payment: Handled by	H0: The variables are independent	≈0.000	Reject H0
Parents	H1: The variables are not independent		

Table 15 - Summary of related variables with Age after the Chi-Square test (Source: Own elaboration on SPSS)

According to Chi-Square test the variables L4, L7, P19, P38 and P39 are not independent of Age. Older respondents showed more brand involvement and autonomy in payments, as for younger respondents are still very dependent of parents to make payments. Facebook usage also seems to be more used by younger participants. All the other variables had no significant results to reject the null hypothesis.

Variables	Hypothesis	p-value	Alpha	Decision
Gender * P7 - Hobbies:	H0: The variables are independent	0.006	0.05	Reject H0
Gaming	H1: The variables are not independent			
Gender * P12 - Electronic	H0: The variables are independent	0.002	0.05	Reject H0
Devices: Video Game	H1: The variables are not independent			
Console	•			
Gender * P27 - Favorite	H0: The variables are independent	0.022	0.05	Reject H0
Products: Trainers	H1: The variables are not independent			

Gender * P28 - Favorite	H0: The variables are independent	0.027	0.05	Reject H0
Products: Clothes	H1: The variables are not independent			·
Gender * P29 - Favorite	H0: The variables are independent	≈0.000	0.05	Reject H0
Products: Tech	H1: The variables are not independent			
Gender * P31 - Last	H0: The variables are independent	0.022	0.05	Reject H0
Purchase: Trainers	H1: The variables are not independent			
Gender * P32 - Last	H0: The variables are independent	≈0.000	0.05	Reject H0
Purchase: Clothes	H1: The variables are not independent			·
Gender * P33 - Last	H0: The variables are independent	0.017	0.05	Reject H0
Purchase: Tech	H1: The variables are not independent			·

Table 16 - Summary of related variables with Gender after the Chi-Square test (Source: Own elaboration on SPSS)

According to the Chi-Square test the variables P7, P12, P27, P28, P29, P31, P32 and P33 are not independent of Gender. The results show a clear diversion of interests between genders, male respondents favor gaming hobbies/electronics, tech products and trainers. Female respondents seem to be more inclined to clothing products. All the other variables had no significant results to reject the null hypothesis.

In conclusion, the Chi Square provided significant evidence that he variables L4, L7, P19, P38 and P39 are dependent of Age and the variables P7, P12, P27, P28, P29, P31, P32 and P33 are dependent of Gender.

As for the Mann-Whitney analysis the same assumptions were used, being an alternative to the T Test, the objective was to verify is the averages of two independent groups are the same. Since this test only allows for the usage of quantitative variables, only the brand loyalty variables were tested according to Age and Gender. However, no significant results were obtained, thus, there is no significant difference in brand loyalty according to the age and gender in Gen Z. The differences in results of the two tests used can be attributed to the calculation process of each. The Chi-Square uses counts and frequency of occurrences and the Mann-Whitney is based on averages, therefore, the outcomes of both tests can differ between them.

1.3 Generational Profile

To understand the active participation or non-participation on the RET technique portion of this research a Logistic Regression analysis was conducted, aimed at modeling the occurrence of participation based on possible significant independent variables (Marôco, 2014); in this case, the profile characteristics were used. To the same effect, a Discriminant Analysis was used to assert the variables that better differentiate between two structurally

different and mutually exclusive groups, used to create an index – discriminant function - representing the distinctions between groups (Marôco, 2014).

Both analysis presented no statistical significant results and therefore are no presented here but are briefly detailed in Attachment 7.

1.4 Cluster Analysis

The profile database achieved with in-depth interviews was used to attempt a clustering analysis to provide insights on behaviors variables to lead future researches. The clustering was performed with the Daisy Function and obtained 5 clusters out of the 35 respondents database. The 5 clusters were embodied as such:

Cluster 1	9 individuals
Cluster 2	4 individuals
Cluster 3	5 individuals
Cluster 4	13 individuals
Cluster 5	4 individuals

Table 17 - Cluster Composition (Source: Own elaboration on R)

As for characterization the clusters followed the presented composition:

- Cluster 1: Female individuals who don't favor shopping or gamming as hobbies. They use twitter as social network and are very interested in technology products. As for payment options, they handle their own payments but do not use paypal.
- Cluster 2: Male individuals deeply involved with sports that don't particularly enjoy shopping, they are not big travelers or into playing games or use Netflix. They are big Whatsapp users but don't use Messenger, Twitch or Musicaly social networks. They are big fans of trainers and don't use credit cards.
- Cluster 3: Mixed gender group, that are not big fans of shopping or traveling. Very connected
 to personal computer and don't enjoy reading magazines. Big Instagram users, and don't use
 Twitter, Twitch nor Musicaly social networks. As for payment methods, they don't use
 Paypal or credit card.
- Cluster 4: Mixed gender group, who don't particularly enjoy shopping. They are not printed
 media users and don't read magazines or newspapers neither use Netflix. As for social
 networks, Musicaly and Youtube are not options for this cluster. As for payments, they don't
 use Paypal nor ATM.
- Cluster 5: Mixed gender group, not artistic nor gaming fans. Very into their computer and don't like to read newspapers. As for social networks, Instagram and Twitter are in. They

prefer sneakers and clothes, and are not big fans of technology or beauty products. Also they do not use any means of payment, as they leave those tasks to the parents.

1.5 Brand Loyalty

The Brand Loyalty questionnaire asked for respondents to choose their three favorite brands of trainers and answer for each one. Out of 35 respondents 18 unique brands were chosen with an almost 60% preference to Adidas (29%) and Nike (28%).

Brand	Total	Percentage	Loyalty Avg
Adidas	30	29%	4,9
Nike	29	28%	4,7
New Balance	8	8%	4,5
Vans	7	7%	3,6
Puma	6	6%	4,5
All star	4	4%	3,9
Asics	4	4%	3,6
Primark	3	3%	5,1
DC	2	2%	4,0
Reebok	2	2%	3,4
Element	2	2%	2,8
Seaside	2	2%	1,8
Timberland	1	1%	6,8
Berg	1	1%	6,0
Quechua	1	1%	5,3
Zara	1	1%	4,9
Sportzone	1	1%	3,1
CR7	1	1%	2,7

Table 18 - Brand Loyalty brands distribution (Source: Own elaboration)

The brands Adidas and Nike had also the highest level of average Brand Loyalty scored, topped only by Primark, that although is not a specialized trainers brand, has sports shoes amongst their retail catalog. The average for brands chosen only by one participant were not found relevant for this conclusions due to low sample size.

The average scoring of each item on the Brand Loyalty Scale yields the questions with the highest (5.8) and lowest (3.3) scores were, respectively, L4 - "I intend to keep purchasing this brand" and L6 - "This is the only brand of this type of product that I will buy". This disparity can be understood as a divided brand loyalty instead of undivided brand loyalty (S. S. Srinivasan et al., 2002). Gen Z also shows to have a low felling of commitment to brands and is not willing to pay over the standard market price for these products.

	L1 - I	L2 - I will	L3 - I	L4 - I am	L5 - I	L6 - This	L7 - When	L8 - If	L9 - I
	think of	buy this	intend to	committed	would be	is the only	I go	my store	would
	myself as	brand the	keep	to this	willing to	brand of	shopping, I	is out of	rather
	a loyal	next time	purchasing	brand	pay a	this type	don't even	this	stick
	buyer of	I buy this	this brand		higher	of product	notice	brand, I'll	with this
	this	kind of			price for	that I will	competing	postpone	brand
	brand.	product			this	buy	brands	buying or	than try
					brand			go to	other
					over			another	brands I
					other			store	am not
					brands				sure of.
Avg.	4,8	4,8	5,8	3,7	3,8	3,3	4,1	4,9	4,9

Table 19 - Brand Loyalty questionnaire answer average (Source: Own elaboration)

1.6 RET Technique

The second part of this research asked of participants to report, during 7 days, every time they saw a touchpoint of the previously selected brands and evaluated in a scale of 1 (Very Negative) to 5 (Very Positive).

The RET Technique did not have full participation by the respondents. Out of 35 participants only 30 participated and of those, only 17 had an active participation and reported touchpoint sightings. A total of 96 answers were collected, 29 of those were reporting that no sighting had occurred, thus 67 valid interactions were reported and used for analysis.

Age	12	13	14	15	16	17	18	Total
Gender Feminine	2	2	2	2	1	1	2	12
Masculine	2	2	1					5

Table 20 - Participation distribution (n = 17 individuals) (Source: Own elaboration)

Touchpoint	Total	0/0	Evaluation Avg
Instagram	38	57	4.7
Store	11	16	4.0
Youtube	11	16	4.9
Outdoor	7	10	3.7

Table 21- Touchpoint distribution (n = 67 sightings) (Source: Own elaboration)

Brand	#	%	Evaluation Avg
Adidas	28	48	4.57
Nike	16	28	4.38
New Balance	11	19	4.27
Vans	4	7	5.00
Puma	3	5	5.00

All star	2	3	4.50	
Primark	2	3	5.00	
Sportzone	1	2	3.00	

Table 22 - Brands seen distribution (n = 67 sightings) (Source: Own elaboration)

Female respondents were largely more engaged with the study, comprising over 70% of the respondents actively participating. As for the touchpoints reported, 57% occurred in Instagram, 32% occurred in equal spit in YouTube and In Store with the remaining 10% being seen in Outdoor campaigns. The respondents received 26 different touchpoint types as possibilities in the study explanation, which demonstrates that independently of the possibilities the attention showed to the four touchpoints reported was far greater.

Regarding Brands seen in touchpoints reported, the same two brands keep the first places that brand favorites and brand loyalty remaining congruent on top. Adidas (48%) and Nike (28%) were the most seen brands, followed by New Balance (19%). The brands with the higher touchpoint positivity score were however Puma, Vans and Primark with an even 5,00.

In the consequence of knowing the sample and the questions in the study, it is necessary to develop an impact assessment analysis. The Kruskal-Wallis H test conducted to the RET data collected in this research aimed to understand if the variables observed by the respondents had an impact on the Positivity reported. To this effect the variables Brand and Touchpoint were tested, grouped by the Positivity variable.

Kruskal-Wallis Test	Touchpoint	Brand
Chi-Square	74,456	72,809
gl	4	8
Sig.	≈0.000	≈0.000

Table 23 - Summary results of the Kruskal-Wallis H Test (Source: Own elaboration on SPSS)

To measure that impact, the Kruskal-Wallis H test determines if there are statistically significant differences between groups of an independent variable on a continuous dependent variable (Marôco, 2014). The Kruskal-Wallis H test shows that both touchpoint and brand have a statistically significant result ($p\approx0,000 < \alpha$). As so, it can be concluded that the evaluation given to the touchpoint sighting is impacted by the type of touchpoint and the brand seen.

The RET methodology also included a diary push to be sent out to participants to obtain more information about the sightings reported. Although the answers were scarce, in 42% of occurrences the participants stated to have seen a touchpoint with celebrities. The

touchpoints with celebrities had a slightly higher positivity average (4.8) than the pure brand sightings (4.3). This may be due to the impact of celebrities on the customers' perceptions of brands and advertisements, as theorized by Silvera and Austad (2004) (Silvera & Austad, 2004).

2. Discussion

This chapter discusses the results presented in the previous section, taking into account the theoretical framework enclosed in the Literature Review chapter. The used data was collected from 35 respondents and can be divided in three main data sources: in-depth interviews; questionnaire regarding brand loyalty and Real Time Experience tracking method. The respondents were all Gen Z adolescents with ages ranging from 12 to 18 years old (Puiu, 2016) and from both genders. This research was conducted as an exploratory study of the new generation of customers and the impacts of touchpoints considering both topics are still in its infancy and the academic research on them is quite scarce. The size of the sample used is aligned with the typical sample size for qualitative research that reaches a point of saturation (Guest et al., 2006) in the collected information and uses this metric as a cutoff point. The exploratory nature of this research imposes some limitations that will be addressed in the subsequent chapter.

The main focus of this work was to understand the profile of Gen Z customers and the way they relate to brands specifically regarding loyalty; to uncover particularities on their path to purchase; and to shed some light on the possible impacts of touchpoints on brand loyalty. The cross analysis of the three data sources obtained provided some insights on the research questions.

2.1 Gen Z Customer Profile

Given the results presented in the previous section (see In-depth Interviews) it is possible to build a profile of the Gen Z customer. The findings of this research show that Gen Z is a highly digitally connected generation. They seem to be very at ease with technology ever since an early age. Every respondent stated to have a personal smartphone and several other electronic devices such as computers and tablets. The most used device is, however, the smartphone. Some respondents claimed to use this device for every digital action, even school work, research purposes and watching movies or shows in favor of computers or TV sets. These conclusions build on the work done by Zhitomirsky-Geffet & Blau (2016)

demonstrating the deep connection Gen Z has with technology and how, particularly smartphones, are a dependency factor for simple day-to-day activities. Also Southgate (2017) demonstrated that Gen Z spends a significant amount of spare time using mobile devices in detriment to other electronic mean such as TV or printed media. The present work supports these findings and shows Gen Z's adoption of printed media is uncommon. The new generation has a need to be online at all moments being indispensable to them to have this device for permanent communication and entertainment (Lee et al., 2014; Ozkan & Solmaz, 2015; Zhitomirsky-Geffet & Blau, 2016). It is clear that for these customers mobile is the way to go.

As for online presence, Gen Z also seems to be very active. On average, each respondent has 3 social networks accounts, some stating to have up to 6 different social networks. They favor communication apps such as Whatsapp and Messenger with an emphasis on the former. As stated by PrakashYadav & Rai (2017, page 111), Gen Z "[...] has more tendencies to prefer online sites for communicate and interact with people than other generations [...]" which is congruent with the findings of the present work (PrakashYadav & Rai, 2017). However, an overwhelming majority has and actively engages with Instagram above all, being the most used social network, in which they also use an instant messaging feature for communication purposes. Facebook closely follows Instagram as top rank yet Gen Z is not so engaged with the social media giant, and keeps their account active only for group events and to keep in touch with older family members that did not have Instagram. The Chi-Square test provided evidence that Facebook was most present in younger respondents of Gen Z generation, the older ones have already disconnected from the social network. We can assess from this that as far as social media is concerned, Instagram has a central role in Gen Z's preference and usage.

Although Gen Z is not brand fanatic, they are consistent with the brands they favor. When asked about favorite brands overall the answers were steady across gender and age, Gen Z loves Adidas and Nike most of all, closely followed by Zara and Pull and Bear. The brands chosen as favorites for the Brand Loyalty and RET method portions of this research are congruent with the preferences noted. Adidas and Nike lead the charts both in number of respondents with almost 30% of preference each, as well as loyalty average index with 4,9 and 4,7 respectively. As for favorite retail categories, the majority prefers trainers, which is valid in all age ranges. Clothing comes as a close second but mostly for female respondents, and tech being in third with only male preference as supported by the results of the Chi-

Square test. The same outcome was assessed in a study conducted by Agante (2009) where children and teenagers inside the same age range of Gen Z currently showed to have the same preferences regarding product categories (apparel and clothing) as well as specific favorite brands, namely Adidas, Nike and Zara as previously assessed in the present work.

Interestingly, the technology savviness and online presence of Gen Z does not translate in an online shopping behavior. They regularly visit brands websites and online shops on their mobile devices, looking for new products or doing research on future purchases but refrain from making the purchase online, preferring to buy in physical stores. The perceived risk of online purchasing is still much embedded in this generation at the time, they fear that the orders are not real or that product descriptions and photographs are misleading (Beatty et al., 2011; Grabner-Kraeuter, 2002; McKnight et al., 2002). Although the risks of online purchase have been constant, so has the adoption of this type of purchase due to ease of use (Corbitt et al., 2003; Fang et al., 2014; Pavlou, 2003). Gen Z seems to have some feelings of unease also due to parents' influence and decision. Policy on returns is one other matter of reluctance to overcome perceived risks. The ones that feel comfortable enough to purchase online do it mostly with tech items.

Lastly, on profile characteristics, Gen Z is not very comfortable with electronic payment methods. The younger respondents have no control over that stage of the purchasing process and the parents handle all money related subjects as supported by the Chi-Square test. The test also showed that the older participants use mostly ATM and Debit Cards to pay for the things they buy.

2.2 New Path to Purchase

Looking back on the results presented in 1.1 In-depth Interviews it can be understood the path to purchase Gen Z is taking. As stated by the respondents, purchases are more often than not a thought process even when it comes to less significant items, Gen Z seems to be carefully choosing the products to ensure full satisfaction. Naturally, the main focus in the path to purchase was the research stage that was divided in the type of research done, the channel used and the brands considered. As for the channels of research, Gen Z likes to cover all the basics and looks through both online and offline possibilities, mostly because they feel that brands don't have a strong omnichannel presence and find substantial differences in the catalog found online and in stores. For this reason, they prefer to look to both and be able to choose the best suited product. Brand consideration however, seems to

be more consistent and, even though, in specific cases there is no brand filter such as tech accessories, in most situations there is a brand bias to begin the search. Gen Z feels the brands they already know and use have the products they need and don't venture out in widening their search to unknown brands. In some cases, mostly with trainers, they are quite consistent with the choices made, often purchasing the same shoe models when the ones they have start to get old. The evaluation stage is also relevant for this generation that, since early on, start to make price comparisons along with product characteristics comparison. Gen Z is very aware of the price they will pay for the product and want to ensure that they are choosing the best item available for the smaller price possible. So, even though, they may be brand biased and will not purchase just for price sake, they also will not buy the first product they like or in the first store they find. Another main particularity about the evaluation stage for Gen Z is the recommendation about the product. Gen Z feels very strongly in having favorable opinions about what they are buying, being very permeable to friends and family views, actively seeking validation. Lastly, the after purchase behavior of Gen Z seems to be more conservative as they are not keen in sharing online the purchases made. They do, however, frequently comment offline and discuss the things they buy not only to get feedback but to offer advices about the purchased products so that when others need to buy something similar, they have previous information.

2.3 Segmenting Gen Z

The previous section presented the results of a clustering analysis on the profile database conducted to provide insights to future research on possible segmentation of Gen Z. The analysis concluded with 5 clusters that aggregated behavioral features of the respondents. To the extent of the researchers' knowledge no previous work has been done on segmenting Gen Z, therefore, no comparison with previous studies is possible. The outcomes of this exploratory segmentation lead to interesting features of the respondents. The clustering showed three distinct behavioral groups. Cluster 1 and 2 also had a clear division of gender. Cluster 1 embodied *Tech Girls*, female respondents who enjoy and favor technology products and are mostly present on Twitter. The second Cluster is for *Sports Guys* composed of male individuals very into sports who use Whatsapp a lot and loves trainers. As for clusters 3 through 5 are all mixed gender and mostly join at the dislikes more than the likes. All three are not printed media fans. Cluster 3 favors Instagram as social network and cluster 5 is into Instagram and Twitter, Cluster 4 however, has no preference on social network usage but

stays away from Youtube. Lastly, Cluster 5 figures as the Fashionable Gen Z'ers as they are very into clothing and trainers, although they are not managing their financials by themselves and leave those tasks to parents. As previously stated, the clustering and segmentation here obtained was made on an exploratory basis and should be viewed as a lead for future research as it lacks scalability and grouding.

2.4 Brand Loyalty in Gen Z

Regarding Brand Loyalty in Gen Z and recalling the results present in Loyalty and Recommendations Motivators and 1.5 Brand Loyalty, it was assessed that the concept of loyalty mostly focus on product characteristics such as quality, aesthetics and durability. Building on the work conducted by Haryanto, Moutinho, & Coelho (2016) which posited that young people do not show loyalty to brands per se but to product characteristics, Gen Z seems to confirm this conclusion. The authors also included Brand Trust as an antecedent of Brand Loyalty and the results of this research are aligned with this supposition as for Gen Z stated to trust brands being one of the motivators of loyalty and recommendation in their eyes.

Loyalty in Gen Z, when existing, seems to have a mix of attitudinal and behavioral loyalty without showing absolute loyalty or commitment to any brand. As theorized by (Huang, 2017; Menidjel et al., 2017) attitudinal loyalty pertains to brand beliefs and affections, on the other hand, behavior loyalty takes actions into account. The results presented in 1.5 Brand Loyalty show that Gen Z has a mediocre score of loyalty index regarding any of their favorite brands chosen, scoring the lowest in commitment to brands and willingness to pay higher prices for the brand. The Chi Square provided evidence that age had an impact on commitment hence younger participants showed to be less committed to brands. Even though they stated to feel loyal to brands, it does not translate to purchasing. The disparity of results on the questions with the highest (5.8) and lowest (3.3) scores were, respectively, "I intent to keep purchasing this brand" and "This is the only brand of this type of product that I will buy" can be understood as a divided brand loyalty instead of undivided brand loyalty (S. S. Srinivasan et al., 2002). The Chi Square also provided evidence that older Gen Z'ers are more likely to pay attention to competing brands and considering them when shopping in response to the question "When I go shopping, I don't even notice competing brands". This shows that although Gen Z may be loyal to brands to some extent, does not show absolute loyalty or commitment thus preferring to purchase from several brands depending on product and price.

2.5 Touchpoint impact

Lastly, based on the results presented in the previous section (see Table 22) it is possible to affirm that brand and touchpoint type directly impact the Positivity evaluation for Gen Z. Although more than 20 different touchpoint types were presented as possible to the respondents, only 4 had reported sightings. The respondents' answers to the interview established that they had access and used other channels where touchpoints occur, although the results on most used device and main social networks used are aligned with the RET results, which means that even though Gen Z uses them, they do not display the same attention span to them. The touchpoint types seen were in Instagram, YouTube, In store and Outdoors, congruent with the findings of Southgate (2017) regarding Gen Z's most used platforms. Over 50% of sightings occurred in Instagram, however, YouTube sightings had higher positivity ratings. Positively is by definition a real-time affective response (Aaker et al., 2008; Baxendale et al., 2015) and it allows the understanding, when paired with frequency, the touchpoints that mostly impact Gen Z. As such, the findings are that YouTube and Instagram are the most relevant touchpoint types for Gen Z and also have the higher affective response impact on this new generation. Regarding brand's impact on touchpoint positivity, the same two brands (Adidas and Nike) that have consistently been top preference for Gen Z in this research remain the most seen but do not have the higher affective response being dethroned by smaller brands that speak to Gen Z's particularities such as design and aesthetics.

Still on touchpoints, the follow up on reports allowed for another interesting conclusion. Most of the touchpoint sightings were celebrity endorsements which also had the higher positivity average. These findings are congruent with the research conducted by Southgate (2017) that states celebrities are of great importance in impacting Gen Z's positivity towards advertisement, particularly online and social media celebrities (Southgate, 2017). The impact of celebrities on the customers' perceptions of brands and advertisements (Silvera & Austad, 2004) has also been assessed in academic literature and is congruent with these findings.

3. Limitations and Future Research

One of the main limitation of the present work is connected to the size and composition of the sample used. The sample is very small in number and, as such, may be difficult to generalize the conclusions drawn to the whole generation of Gen Z customers. As seen in the results chapter, some statistical analysis tests were not conclusive due to the few number of respondents. Also, although the sample included respondents from both genders; all ages of Gen Z; and different economic and sociologic backgrounds, the sample came from the same Scouts association so a degree of resemblance between the participants is expected. Therefore, future research needs to be done in this path to better characterize and profile Gen Z with its specificities and behaviors regarding path to purchase, brand relationships and touchpoint impact. The main focus of this research was based on the subjects self-reporting which may be biased (Zhitomirsky-Geffet & Blau, 2016), even more so due to the young age of participants. The impact Gen Z will have in retail and business management is expected to be even higher that Millennials, there for, it's imperative to study deeper this new generation and understand how to relate to them.

Another relevant limitation to this study is connected to the novelty of the research questions and lack of academic support in methodological structure. The study of touchpoint impact is still an unexplored topic with few endeavors attempts at understanding and mapping the consequences of interactions with customers. The RET methodology figures as the best possibility to assess real-time response towards touchpoints, however, since it is a mere photography of time, it does not consider the continued contact with touchpoints or the impact of effective purchase behavior. Although in this research the relation between brand and touchpoint type to positivity reported was considered, the present methodology does not provide any accurate way to measure possible bias in evaluation or attention and therefore frequency of sightings due to the importance of the brand in the respondent preference. Future research may focus on the development of methods to accurately assess and explain the impact of different touchpoints in customers. Also the distinguishing impact of isolated and combined touchpoints would be of great relevance both to academic progress and business management.

Once again, the exploratory nature of this work and lack of clarity on the subject in academic research lead many limitations to be covered as the objective is to begin to understand the topics at hand. The fundamental nature of the research is to create a background on which to build deeper and conclusive research on Gen Z and touchpoint impact.

Conclusion

The purpose of the present work was to shed some light on two main topics relevant to both academic research as well as business management. Like every generation, Gen Z has very particular behaviors and beliefs, and the rapidly changing world of today (Wind & Hays, 2016) makes it impossible to keep still as the disruption of retail is in constant move. It is through this basis that the present work aims to help business management and academic research providing exploratory insights on how to connect and understand the new generation of customers who, sooner rather than later, will be shaping the retail world. The second topic approached in this research concerns Gen Z's specific engagement with brand touchpoints. Brands spend large amounts to connect with customers through wide ranging platforms and means but the outcome of these efforts is still unaccounted. Measuring results and truly understand the impact touchpoints have on customers has proven to be a challenge, thus, it is very important for business to know the outcomes and plan accordingly to reallocate financial and human resources.

Starting from a theoretical background to understand the customer journey, experience and touchpoints allied with brand assets and Gen Z known profile this research is conducted through a mixed methodology approach. Being such insipient topics in academic research the basis of study figures as more exploratory than definitive in the methods used and conclusions drawn. The exploratory nature of the subjects and the study itself, uses in depth interviews applied to a small sample of Gen Z'ers to understand who they are, what they like and what motivates them. The same sample takes part in an experimental research technique (Real Time Experience Tracking) to provide insights on the touchpoints most seen and impactful to Gen Z. The results and discussion presented before should be seen as leads and basis of future and more conclusive research. The data used was collected from 35 respondents with ages ranging from 12 to 18 years old (Puiu, 2016) and from both genders.

As for Gen Z, the outcomes of the present research, lead to a profile of a generation that is highly digitally connected being used to technology since a very early age. The smartphone is by far their favorite device and using it for everything, therefore, business needs to keep the importance of mobile in mind. Social networks are big for this generation although a shift in favorites is noticeable, Instagram being preferred over Facebook and instant messaging services as most used. The digital dependence does not translate to online

shopping though. Gen Z regularly visits brands websites and online shops but prefers to buy offline. Here the main reasons go with risk perceptions on deceit and lack of trust in retailer and delivery. As for product categories as brands, Gen Z loves trainers overall with Adidas and Nike leading the top, clothing comes as a close second but mostly for female respondents, and tech being in third with only male preference. Gen Z also seems to be low on loyalty to brands, favoring product characteristics such as quality, aesthetics and durability. Brand trust goes a long way for these customers and even though they stated to feel loyal to brands, it does not translate to purchasing being a shared loyalty between a selected group of brands.

The new path to purchase is paved with research, Gen Z makes sure the product they're getting is the best for the price they pay. These customers look for price and product characteristics comparisons and wouldn't go for the first possibility but will not stray too far from the brands they know and show bias in purchasing consideration. They search both online and offline for feelings of mistrust and lack of congruence with the physical and digital presence of brands. Beyond research, Gen Z shows to be very permeable to friends and family views, actively seeking validation of future purchases.

As far as touchpoints go, Gen Z's evaluation is positively connected to the type of touchpoint and brand seen. Over 50% of sightings occurred in Instagram, however, YouTube sightings had higher positivity ratings. Businesses clearly need to focus on these platforms to reach new customers as they are not paying attention to many of the other places advertisements are being placed. In addition, most of the touchpoint sightings included celebrity endorsements which also had the higher positivity average.

The insights drawn from the present should be interpreted as leads to be followed for future research and business initiatives as the limitations previously presented provide a status of exploratory research rather than definitive conclusions. Gen Z will bring an even more dizzying disruption in marketing and management, therefore, businesses need to be prepared to address the concerns and demands of the new customer. Only the ones who can adapt to new and challenging customers will succeed in the new digital business world.

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Attachments

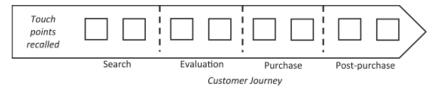
Attachment 1 - In-depth Interview Script

Part I – Demographic questions and characterization of the individual

- Age | Gender
- Interests and hobbies
- What devices do you have (Smartphone, tablet, Computer, kindle, TV)? Please tell me about when and what you use them for.
 - Do you watch TV? Read magazines? What channels/publications? Tv shows?
 - What about social media, which accounts do you have? What do you use them for?
 - What are your favorite brands/products and why?
 - Do you follow any brand on social media and interact with them?
 - Do you share brand posts with friends? Why?
 - What makes you keep buying the same brand or recommended it?
 - Have you ever purchased online? Do you prefer to buy on or offline? Why?

Part II – Customer Journey

• Think about the last time you bought (items mentioned in previous questions). Please explained the steps followed in each stage of the purchase journey and the touchpoints and actions taken.



- Why did you buy it?
- How did you research it?
- Did you talk to friends about it? Asked their opinion?
- Compare it with other products/brands? What features were relevant to you?
- Were you happy with the moment of purchase? What do you think were the best and worst things about that moment of purchase?
 - Were you happy with the product? What made you feel after buying it?
 - Did you recommended it to anyone or post about it?

Attachment 2 - Questionnaire

Questionário

ID de participante:		
Idade:		
Sexo:		

(A preencher pelo investigador)

MARCA A

1. Relativamente à marca A indica o grau de concordância/discordância em relação a cada uma das afirmações: (escrever um número de 1 a 7:

1 – discordo totalmente, 7 – concordo totalmente)

- Eu considero-me um cliente leal desta marca
- Vou comprar esta marca da próxima vez que comprar um produto deste género
- Tenciono continuar a comprar esta marca
- Estou comprometido com esta marca
- Estou disposto a pagar um preço mais elevado por esta marca em relação a outras
- Esta é a única marca deste tipo de produtos que eu compro
- Quando vou às compras sinto-me indiferente a marcas concorrentes
- Se o produto desta marca estiver esgotado, adio a minha compra ou procuro outra loja que o tenha
- Prefiro continuar a comprar esta marca do que comprar outra marca que não conheço tao bem

MARCA B

2. Relativamente à marca B indica o grau de concordância/discordância em relação a cada uma das afirmações: (escrever um número de 1 a 7:

<u>1 – discordo totalmente, 7 – concordo totalmente)</u>

- Eu considero-me um cliente leal desta marca
- Vou comprar esta marca da próxima vez que comprar um produto deste género
- Tenciono continuar a comprar esta marca

- Estou comprometido com esta marca
- Estou disposto a pagar um preço mais elevado por esta marca em relação a outras
- Esta é a única marca deste tipo de produtos que eu compro
- Quando vou às compras sinto-me indiferente a marcas concorrentes
- Se o produto desta marca estiver esgotado, adio a minha compra ou procuro outra loja que o tenha
- Prefiro continuar a comprar esta marca do que comprar outra marca que não conheço tao bem

MARCA C

3. Relativamente à marca C indica o grau de concordância/discordância em relação a cada uma das afirmações: (escrever um número de 1 a 7:

<u>1 – discordo totalmente</u>, <u>7 – concordo totalmente</u>)

- Eu considero-me um cliente leal desta marca
- Vou comprar esta marca da próxima vez que comprar um produto deste género
- Tenciono continuar a comprar esta marca
- Estou comprometido com esta marca
- Estou disposto a pagar um preço mais elevado por esta marca em relação a outras
- Esta é a única marca deste tipo de produtos que eu compro
- Quando vou às compras sinto-me indiferente a marcas concorrentes
- Se o produto desta marca estiver esgotado, adio a minha compra ou procuro outra loja que o tenha
- Prefiro continuar a comprar esta marca do que comprar outra marca que não conheço tao bem

Obrigada pela tua participação!

Attachment 3 - Diary Example

Day 1 | Participant #12

➤ Message 1 – AC3

Brand: A | Touchpoint Encountered: Radio | Positivity: 3

Complementary questions:

- Did the touchpoint belong to the brand or a retailer?
- If it belong to a retailer, which one?
- Did anyone show it to you or did you see it yourself?
- Why did or didn't you like it?
- Do you have any comments or pictures to add to this message?

➤ Message 2 – BO5

Brand: B | Touchpoint Encountered: Facebook | Positivity: 5

Complementary questions:

- Did the touchpoint belong to the brand or a retailer?
- If it belong to a retailer, which one?
- Did anyone show it to you or did you see it yourself?
- Why did or didn't you like it?
- Do you have any comments or pictures to add to this message?

➤ Message 3 – AT1

Brand: A | Touchpoint Encountered: Youtube | Positivity: 1

Complementary questions:

- Did the touchpoint belong to the brand or a retailer?
- If it belong to a retailer, which one?
- Did anyone show it to you or did you see it yourself?
- Why did or didn't you like it?
- Do you have any comments or pictures to add to this message?

Attachment 4 – Consent form for parents



Susana Estácio Marques, Aluna do mestrado em Marketing

Assunto: Consentimento para participação num estudo sobre o impacto dos pontos de contacto das marcas na lealdade de vendas

Exmo. Encarregado de Educação,

No âmbito do desenvolvimento da minha dissertação do Mestrado em Marketing na Faculdade de Economia da Universidade do Porto (FEP) estou a estudar o impacto dos pontos de contacto das marcas no comportamento do consumidor da geração Z (12 a 18 anos).

O estudo pretende compreender a percurso dos consumidores da geração Z antes, durante e após a compra, assim como, identificar o impacto que os pontos de contacto que existem entre as marcas e os clientes tem na lealdade à marca e nas vendas. O estudo é puramente académico não tendo qualquer parceria ou ligação a marcas ou empresas. Desta forma, a contribuição deste estudo prendese a um conhecimento académico mais aprofundado nas características e inovação de atitude da nova geração de consumidores e a um conhecimento prático a nível de gestão de marketing sobre como trabalhar com a geração Z.

Esta investigação compromete-se a respeitar todas as questões éticas envolvidas em estudos com crianças, nomeadamente as diretivas propostas pela UNICEF (2013) e as considerações sugeridas por Greig et al. (2007), na publicação "Doing Research with Children". Neste sentido, e atendendo à ampla proteção que se deve garantir no tratamento de dados pessoais de menores, estarão garantidos os interesses das crianças, a sua privacidade e vontade.

Por forma a respeitar as normas éticas da investigação com crianças, será também solicitada, verbalmente, a autorização das crianças/jovens para participarem no estudo, mesmo tendo sido obtido o consentimento legal é junto dos respetivos encarregados de educação. Neste sentido, antes do desenvolvimento do estudo através do questionário, será apresentado às crianças o objetivo do estudo, e as condições de licitude do tratamento de dados pessoais, bem como, os trâmites da sua participação, de modo a que as mesmas se sintam parte do processo e possam sempre decidir se participam ou não no estudo. Mais se

informa, que os menores participantes podem abandonar o estudo a qualquer momento, e que não são obrigados a responder a todas as questões se não o entenderem.

A concretização deste estudo requer dados pessoais e, como tal, solicito que o(a) seu educando(a) seja entrevistado e realize um teste experimental de comunicação de publicidades encontradas no diaa-dia. Isto é, durante os sete dias da experiência, sempre que for visto um ponto de contacto de um conjunto de marcas (por exemplo: anúncio de TV, publicação numa rede social, o produto da marca numa loja, outros) deve ser enviada uma comunicação por mensagem escrita à estudante sobre o qual a marca, o ponto de contacto e a positividade do encontro.

Serão apenas recolhidas as opiniões e relatos de experiências dos adolescentes. Não sendo necessário identificar o menor com nome ou outros dados pessoais, sendo que, para efeitos de anonimização dos dados, apenas serão tratados os dados da idade e do género.

Os dados recolhidos serão analisados em total confidencialidade e apenas para as finalidades indicadas no estudo. No trabalho final, serão apenas publicados resultados gerais do estudo, de forma anonimizada e após tratamento dos dados recolhidos, sem qualquer menção a dados pessoais ou identificações. Os dados pessoais, que não constem de anonimização, serão apenas conservados durante o período necessário à garantia da conclusão do 2º ciclo de estudos. Assim, um ano após a conclusão do 2º ciclo de estudos os dados pessoais não anonimizados serão devidamente apagados.

Mais se informa, que os Dados Pessoais e a Informação recolhidos são adequados, pertinentes e limitados ao estritamente necessário relativamente às finalidades para as quais são objeto de tratamento. Os Dados Pessoais e Informação serão tratados de uma forma que garanta a sua segurança, incluindo a sua proteção contra o seu tratamento não autorizado ou ilícito e contra a sua perda, destruição ou danificação acidental. O direito de acesso, atualização, retificação ou apagamento dos respetivos dados, poderão ser exercidos mediante pedido escrito endereçado ao responsável pelo tratamento, desde que esse exercício não prejudique de forma irreparável a investigação em curso.

Os resultados do estudo podem ser disponibilizados aos encarregados de educação se requisitados, podendo também vir a ser publicados em artigos ou notícias relacionadas com o tema.

Agradeço desde já a disponibilidade,

Susana Estácio Marques susanaestaciomarques@gmail.com / 917718433

Autorização para o tratamento de dados pessoais		
Eu,, autorizo		
o(a) meu(minha) educando(a) a		
participar no estudo de investigação, "A disrupção do retalho através da Geração Z: O		
impacto dos pontos de contacto na lealdade à marca", realizado por Susana Estácio Marques,		
no âmbito do Mestrado em Marketing, da Faculdade de Economia da Universidade do Porto.		
Desta forma, fui devidamente informado das finalidades do tratamento dos dados		
recolhidos, bem como, dos direitos do meu educando enquanto titular dos dados pessoais,		
objeto da presente investigação.		
Assim, autorizo expressamente o tratamento dos dados pessoais do meu educando,		
nomeadamente através da gravação e transcrição da entrevista.		
/2018		
Assinatura do Encarregado de educação:		

Attachment 5 – Authorization request to Scouts Association



A disrupção do retalho através da Geração Z: O impacto dos pontos de contacto na lealdade à marca

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Mestrado em Marketing

Orientadores:

Professora Doutora Luísa Agante Professor Doutor Pedro Campos

Porto, maio de 2018

Contexto e Objetivo do Estudo

A proposta deste estudo surge no âmbito do mestrado em marketing da Faculdade de Economia da Universidade do Porto. O mestrado inclui uma componente final de dissertação em que deve ser investigado um tema relevante para a área de marketing, tanto a nível académico como de gestão de empresas. A Geração Z vê a marca de forma diferente que os seus antecessores e conecta-se de uma forma nova perante todos os estímulos que recebe (Google, 2016a). O presente estudo procura responder aos problemas que as empresas já começam a sentir e enfrentarão em larga escala no futuro. O objetivo proposto será compreender qual é o percurso do consumidor desta nova geração de forma a identificar os pontos de contacto com as marcas que encontra; e ainda identificar, de todos os pontos, quais são os responsáveis e principais motivadores da construção de lealdade à marca e a conclusão da compra.

Questões Éticas e Legais

Esta investigação compromete-se a respeitar todas as questões éticas envolvidas em estudos com crianças, nomeadamente as diretivas propostas pela UNICEF (2013) e as considerações sugeridas por Greig et al. (2007), na publicação "Doing Research with Children". Neste sentido, e atendendo à ampla proteção que se deve garantir no tratamento de dados pessoais de menores, estarão garantidos os interesses das crianças, a sua privacidade e vontade.

Em termos legais, de acordo com a lei portuguesa e com o Regulamento Geral de Proteção de Dados Pessoais, serão formulados pedidos de autorização à organização onde será feito o estudo e aos encarregados de educação das crianças que participam no presente estudo (Anexo 1). Deste modo, serão recolhidos previamente ao tratamento de dados, os consentimentos expressos e informados dos encarregados de educação que representam legalmente os menores participantes neste estudo. Estes pedidos contêm a explicação da natureza, licitude e objetivos do estudo, assim como, se informa de forma clara e transparente de todo o processo de recolha e respetivo tratamento de dados pessoais.

Por forma a respeitar as normas éticas da investigação com crianças, será também solicitada, verbalmente, a autorização das crianças/jovens para participarem no estudo, mesmo tendo sido obtido o consentimento legal é junto dos respetivos encarregados de educação. Neste sentido, antes do desenvolvimento do estudo através do questionário, será apresentado às crianças o objetivo do estudo, e as condições de licitude do tratamento de

dados pessoais, bem como, os trâmites da sua participação, de modo a que as mesmas se sintam parte do processo e possam sempre decidir se participam ou não no estudo. Mais se informa, que os menores participantes podem abandonar o estudo a qualquer momento, e que não são obrigados a responder a todas as questões se não o entenderem. Nesta senda, garante-se que o consentimento expresso para o tratamento de dados pessoais, é tão fácil de dar como de retirar, por parte dos representantes legais dos titulares dos dados, informandose ainda os titulares dos dados, dos seus direitos e do seu modo de exercício, em estrito cumprimento do Regulamento Geral de Proteção de Dados Pessoais.

Amostra

A realização deste estudo incidirá sobre adolescentes em idade compreendida na geração a tratar, ou seja, jovens compreendidos entre os 12 e os 18 anos, que estão na fase de desenvolvimento da função executiva.

O estudo pretende obter uma amostra mínima de 40 crianças onde estejam representadas todas as idades do intervalo e onde seja garantida uma diversidade de ambiente sócio-económico e cultural, dentro de uma população predominantemente urbana.

Procedimento

O método a usar para obter a informação necessária será a entrevista semi-estruturada com um guião pré-preparado com base nos termos académicos a investigar (anexo 2). A entrevista será realizada presencialmente pela estudante, em privado e com cada um dos entrevistados, tudo será gravado e transcrito apenas para propósitos deste estudo. A gravação e transcrição será alvo de autorização expressa pelos encarregados de educação, constituindo a mesma a condição de licitude do tratamento. Serão apenas recolhidas as opiniões e relatos de experiências dos adolescentes. Não será necessário identificar o menor com nome ou outros dados pessoais, sendo que para efeitos de anonimização dos dados apenas serão tratados os dados da idade e do género.

A segunda parte do estudo requer uma experiência de uma semana que apenas se baseia na comunicação dos pontos de contacto encontrados de forma natural. Isto é, durante os sete dias da experiência, sempre que for visto um ponto de contacto de um conjunto de marcas (por exemplo: anúncio de TV, publicação numa rede social, o produto da marca numa loja, outros) deve ser enviada uma comunicação por mensagem escrita (e-mail ou SMS) à estudante da qual consta apenas os seguintes dados: qual a marca, qual o ponto de contacto e qual a positividade do encontro. Este teste tem como objetivo medir quantos pontos de contacto esta geração encontra, quais os meios mais comuns e qual o sentimento perante estes contactos. O teste está desenhado para ter o mínimo de disrupção no dia-a-dia dos adolescentes, utilizando um método de contacto simples e habitual para eles.

Marca	Ponto de Contacto		Positividade
Marca A	TV	Folheto	1 – Muito negativo
Marca B	Cartaz	Restaurante	2 – Negativo
Marca C	Radio	Facebook	3 – Neutro
	Compra	Instagram	4 - Positivo
	Site	Snapchat	5 – Muito positivo
	Cinema	Pinterest	•
	Jornal	Twitter	
	Revista	Youtube	
	Figura pública a	Tumblr	
	patrocinar	Google+	
	Em loja	Netflix	
	Num evento	Outro (especificar)	
	Outra pessoa a comprar	\ 1 /	

Contribuições do estudo

O projeto visa compreender como se relaciona a nova geração de consumidores com as marcas, qual é o seu percurso de compra e como os pontos de contacto que as marcas promovem têm impacto nos consumidores e na sua lealdade à marca. Desta forma, a contribuição deste estudo prende-se a um conhecimento académico mais aprofundado nas características e inovação de atitude da nova geração de consumidores e a um conhecimento prático a nível de gestão de marketing sobre como trabalhar com a geração Z.

Condição de licitude de tratamento dos dados pessoais

Consentimento, escrito, livre e expresso dos encarregados de educação, reafirmado verbalmente pelos menores no momento da entrevista.

Prazo de conservação dos dados pessoais

Os dados pessoais, que não constem de anonimização, serão apenas conservados durante o período necessário à garantia da conclusão do 2º ciclo de estudos. Assim, um ano após a conclusão do 2º ciclo de estudos os dados pessoais não anonimizados serão devidamente apagados.

ANEXO I - Consentimento



Susana Estácio Marques, Aluna do mestrado em Marketing

Assunto: Consentimento para participação num estudo sobre o impacto dos pontos de contacto das marcas na

lealdade de vendas

Exmo. Encarregado de Educação,

No âmbito do desenvolvimento da minha dissertação do Mestrado em Marketing na Faculdade de Economia da Universidade do Porto (FEP) estou a estudar o impacto dos pontos de contacto das marcas no comportamento do consumidor da geração Z (12 a 18 anos).

O estudo pretende compreender a percurso dos consumidores da geração Z antes, durante e após a compra, assim como, identificar o impacto que os pontos de contacto que existem entre as marcas e os clientes tem na lealdade à marca e nas vendas. O estudo é puramente académico não tendo qualquer parceria ou ligação a marcas ou empresas. Desta forma, a contribuição deste estudo prendese a um conhecimento académico mais aprofundado nas características e inovação de atitude da nova geração de consumidores e a um conhecimento prático a nível de gestão de marketing sobre como trabalhar com a geração Z.

Esta investigação compromete-se a respeitar todas as questões éticas envolvidas em estudos com crianças, nomeadamente as diretivas propostas pela UNICEF (2013) e as considerações sugeridas por Greig et al. (2007), na publicação "Doing Research with Children". Neste sentido, e atendendo à ampla proteção que se deve garantir no tratamento de dados pessoais de menores, estarão garantidos os interesses das crianças, a sua privacidade e vontade.

Por forma a respeitar as normas éticas da investigação com crianças, será também solicitada, verbalmente, a autorização das crianças/jovens para participarem no estudo, mesmo tendo sido obtido o consentimento legal é junto dos respetivos encarregados de educação. Neste sentido, antes do desenvolvimento do estudo através do questionário, será apresentado às crianças o objetivo do estudo, e as condições de licitude do tratamento de dados pessoais, bem como, os trâmites da sua participação, de modo a que as mesmas se sintam parte do processo e possam sempre decidir se participam ou não no estudo. Mais se informa, que os menores participantes podem abandonar o estudo a qualquer momento, e que não são obrigados a responder a todas as questões se não o entenderem.

A concretização deste estudo requer dados pessoais e, como tal, solicito que o(a) seu educando(a) seja entrevistado e realize um teste experimental de comunicação de publicidades encontradas no dia-

a-dia. Isto é, durante os sete dias da experiência, sempre que for visto um ponto de contacto de um conjunto de marcas (por exemplo: anúncio de TV, publicação numa rede social, o produto da marca numa loja, outros) deve ser enviada uma comunicação por mensagem escrita à estudante sobre o qual a marca, o ponto de contacto e a positividade do encontro.

Serão apenas recolhidas as opiniões e relatos de experiências dos adolescentes. Não sendo necessário identificar o menor com nome ou outros dados pessoais, sendo que, para efeitos de anonimização dos dados, apenas serão tratados os dados da idade e do género.

Os dados recolhidos serão analisados em total confidencialidade e apenas para as finalidades indicadas no estudo. No trabalho final, serão apenas publicados resultados gerais do estudo, de forma anonimizada e após tratamento dos dados recolhidos, sem qualquer menção a dados pessoais ou identificações. Os dados pessoais, que não constem de anonimização, serão apenas conservados durante o período necessário à garantia da conclusão do 2º ciclo de estudos. Assim, um ano após a conclusão do 2º ciclo de estudos os dados pessoais não anonimizados serão devidamente apagados.

Mais se informa, que os Dados Pessoais e a Informação recolhidos são adequados, pertinentes e limitados ao estritamente necessário relativamente às finalidades para as quais são objeto de tratamento. Os Dados Pessoais e Informação serão tratados de uma forma que garanta a sua segurança, incluindo a sua proteção contra o seu tratamento não autorizado ou ilícito e contra a sua perda, destruição ou danificação acidental. O direito de acesso, atualização, retificação ou apagamento dos respetivos dados, poderão ser exercidos mediante pedido escrito endereçado ao responsável pelo tratamento, desde que esse exercício não prejudique de forma irreparável a investigação em curso.

Os resultados do estudo podem ser disponibilizados aos encarregados de educação se requisitados, podendo também vir a ser publicados em artigos ou notícias relacionadas com o tema.

Agradeço desde já a disponibilidade,

Susana Estácio Marques susanaestaciomarques@gmail.com / 917718433

Autorização para o tratamento de dados pessoais
Eu,, autorizo
o(a) meu(minha) educando(a) a
participar no estudo de investigação, "A disrupção do retalho através da Geração Z: O
impacto dos pontos de contacto na lealdade à marca", realizado por Susana Estácio Marques,
no âmbito do Mestrado em Marketing, da Faculdade de Economia da Universidade do Porto.
Desta forma, fui devidamente informado das finalidades do tratamento dos dados
recolhidos, bem como, dos direitos do meu educando enquanto titular dos dados pessoais,
objeto da presente investigação.
Assim, autorizo expressamente o tratamento dos dados pessoais do meu educando,
nomeadamente através da gravação e transcrição da entrevista.
//2018
Assinatura do Encarregado de educação:

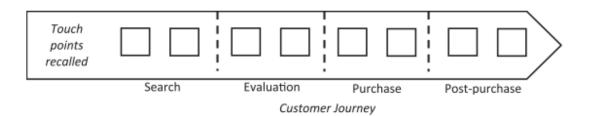
ANEXO II - Guião de entrevista

Parte I – Questões demográficas e caracterização

- Idade e género
- Interesses e hobbies
- Que tipo de dispositivos electrónicos utilizas (telemóvel, tablet)? Quais são os usos principais?
 - Vês televisão, lês revistas? Quais programas/ publicações?
 - E que tipo de redes sociais usas? Para que é que costumas usar?
 - Quais são as tuas marcas e produtos preferidos?
 - Segues e comunicas com alguma marca nas redes sociais?
 - Partilhas publicações de marcas com os teus amigos? Porquê?
 - O que te faz continuar a comprar ou recomendar uma marca?
 - Preferes comprar online ou numa loja? Como utilizas cada uma?

Parte II - Percurso de compra

• Pensa, por favor, na última vez que compraste (produto mencionado nas respostas anteriores. Podes por favor explicar como foi cada um dos momentos dessa compra, desde que decidiste comprar o produto? Por favor relata todos os pontos de contacto com a marca que encontraste e como reagiste.



- O que te levou a querer comprar?
- Como fizeste a pesquisa?
- Falaste com amigos sobre isso? Pediste opiniões?
- Comparaste com outros produtos ou marcas? Quais características foram importantes para ti?
- Ficaste feliz com o memento da compra? O que achaste ter sido o melhor/pior no momento de compra?
 - Ficaste feliz com o produto? O que sentiste depois de o comprares?
 - Recomendaste a alguém ou publicaste alguma coisa sobre isso?

Attachment 6 – Descriptive Data Analysis

In this section, a brief overview of the descriptive analysis of the data is presented, namely, RQDA, descriptive analysis of interviews' coding, the Brand Loyalty frequency, and the Favorite Brands of trainers by gender.

Number	of codings for each code.	
Arts	ATM	Beauty
15	1	1
Brand	Brand interaction	Brand trust
8	3	9
Camera	Clothes	Comenting with friends offline
2	29	10
Computer	Comunication	Credit Card
21	18	2
Design	Durability	Easliness of purchase
15	4	5
Electronic Devices/ Accessories	Exhaustive	Facebook
7	11	20
Follow Celebrities	Gaming	Handled by parents
5	7	7
Impulse	Instagram	Lack of integration in online and offline
7	31	4
Magazines	Messenger	Mobile
4	12	2
Mobile Phone	Musica.ly	Need
66	1	13
Netflix	Newspapers	No and has no intention
5	4	10
No but intends to	Non-Brand related	Offline
9	6	17
Online	Only brand	Orders may never arrive
17	11	3
Parents decision	Participate in contests	Paypal
4	2	2
Pre selected brands	Price comparison	Product Quality
6	6	21
Product Specs	product variety	Products - Others
8	3	1
Products are misleading	Quotes	Recommendations
11	13	23
Regularly visits brand sites	Sharing brand content	Shopping
20	13	2 2
Shopping in stores is a social and leasure activity	Snapchat	Socialization
5	11	20
•	Sports	Superfluous
Social Network sharing		- · · · · · · · · ·
5 Tablet	26	8 Trainage
Tablet	Techonology	Trainers
13	5	33
Travel	TV	Twitch
4	31	2
Twitter	Video games Consoles	Whatsapp
6	7	23
Yes	Youtube	
13	6	

Table 24 - Number of codings for each code

Average number of c	haracters associated witl	h each code.
Arts	ATM	Beauty
19.133.333	105.000.000	10.000.000
Brand	Brand interaction	Brand trust
94.625.000	341.666.667	73.444.444
Camera	Clothes	Comenting with friends offline
19.000.000	23.551.724	109.700.000
Computer	Comunication	Credit Card
17.952.381	60.277.778	34.500.000
Design	Durability	Easliness of purchase
43.266.667	38.000.000	54.000.000
Electronic Devices/ Accessories	Exhaustive	Facebook
33.857.143	91.181.818	8.000.000
Follow Celebrities	Gaming	Handled by parents
187.000.000	24.285.714	81.142.857
Impulse	Instagram	Lack of integration in online and offline
62.000.000	8.838.710	164.500.000
Magazines	Messenger	Mobile
59.500.000	9.000.000	8.500.000
Mobile Phone	Musica.ly	Need
43.439.394	11.000.000	57.846.154
Netflix	Newspapers	No and has no intention
17.800.000	31.000.000	85.300.000
No but intends to	Non-Brand related	Offline
56.888.889	68.166.667	75.235.294
Online	Only brand	Orders may never arrive
79.470.588	86.727.273	159.333.333
Parents decision	Participate in contests	Paypal
62.000.000	110.000.000	28.000.000
Pre selected brands	Price comparison	Product Quality
148.666.667	50.500.000	71.333.333
Product Specs	Product variety	Products - Others
62.250.000	150.666.667	16.000.000
Products are misleading	Quotes	Recommendations
134.000.000	202.230.769	119.391.304
Regularly visits brand sites	Sharing brand content	Shopping
105.800.000	202.230.769	61.000.000
Shopping in stores is a social and leasure activity	Snapchat	Socialization
74.400.000	7.636.364	103.250.000
SocialNetwork sharing	Sports	Superfluous
85.800.000	19.538.462	76.125.000
Tablet	Techonology	Trainers
5.846.154	18.000.000	16.727.273
Travel	TV	Twitch
24.750.000	38.838.710	6.000.000
Twitter	Video games Consoles	Whatsapp
7.000.000	9.000.000	8.000.000
Yes	Youtube	
45.692.308	7.000.000	

Table 25 - Average number of characters associated with each code

Number of fil	es associated with each o	code.
Arts	ATM	Beauty
13	1	1
Brand	Brand interaction	Brand trust
7	3	9
Camera	Clothes	Comenting with friends offline
2	22	10
Computer	Comunication	Credit Card
19	17	2
Design	Durability	Easliness of purchase
15	4	4
Electronic Devices/ Accessories	Exhaustive	Facebook
6	8	20
Follow Celebrities	Gaming	Handled by parents
5	7	7
Impulse	Instagram	Lack of integration in online and offline
6	31	4
Magazines	Messenger	Mobile
4	12	2
Mobile Phone	Musica.ly	Need
35	1	13
Netflix	_	No and has no intention
5	Newspapers 4	9
No but intends to	Non-Brand related	Offline
9	6	15
Online	Only brand	Orders may never arrive
16	11	3
Parents decision	Participate in contests	Paypal
4	2	2
Pre selected brands	Price comparison	Product Quality
6	6	20
Product Specs	Product variety	Products - Others
8	3	1
Products are misleading	Quotes	Recommendations
11	10	19
Regularly visits brand sites	Sharing brand content	Shopping
19	12	2
Shopping in stores is a social and leasure activity	Snapchat	Socialization
5	11	20
SocialNetwork sharing	Sports	Superfluous
5	20	8
Tablet	Techonology	Trainers
13	5	26
Travel	TV	Twitch
4	23	2
Twitter	Video games Consoles	Whatsapp
6	7	23
Yes	Youtube	
13	6	

Table 26 - Number of files associated with each code

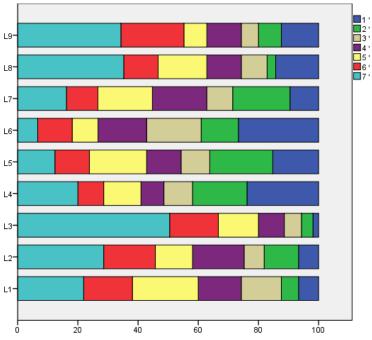
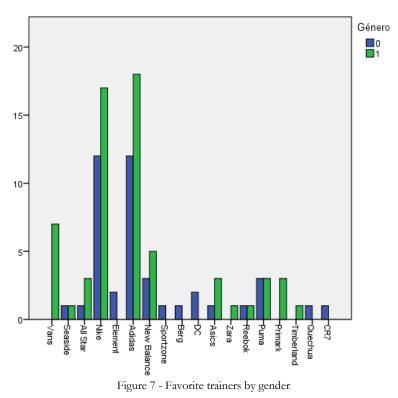


Figure 6 - Brand loyalty frequency



Attachment 7 – Generational Profile Analysis

To understand the relation between the active participation of Gen Z and its generational profile, two analysis were conducted: Logistic Regression and Discriminant Analysis. The former regression technique aimed at modeling the occurrence of participation based on possible significant independent variables (Marôco, 2014); in this case the profile characteristics were used. However, no statistical significant results were attained.

To the same effect, a Discriminant Analysis was used to assert the variables that better differentiate between two structurally different and mutually exclusive groups, used to create an index – discriminant function - representing the distinctions between groups (Marôco, 2014).

The Discriminant Analysis with the stepwise method was performed using the variable "Participation" as dependent (discriminant variable) and all the profile variables as independents. The method extracted only one discriminant function retaining as statistically significant the variables "Participation Push", "Camera", "Facebook", "Age" and the constant "Mobile Phone".

Variable	Discriminant Function Coefficient
Participation Push	1,188
Camera	-,782
Facebook	-,801
Age	,642
Mobile Phone	Constant
Eigenvalue	1,276
Explained Variance	100%
P-value	,000

Table 27 - Discriminant analysis Results (Source: Own elaboration in SPSS)

The function is essentially defined by the variables "Participation Push" and "Age" which explain 100% of the variability between groups. However, the assumptions of homogeneity and normality of the data from both Shapiro-Wilk and Box's M were not verified, thus, invalidating the discriminant analysis.

Attachment 8 – Cluster Analysis

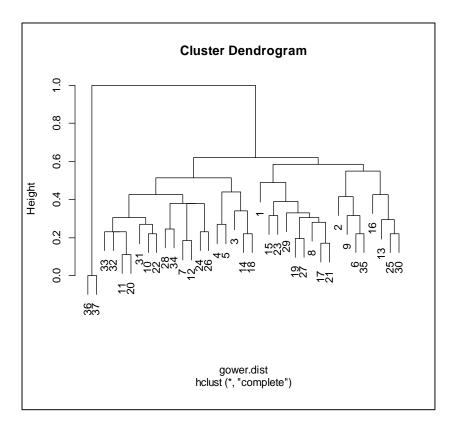


Figure 8 - Dendogram of Cluster analysis

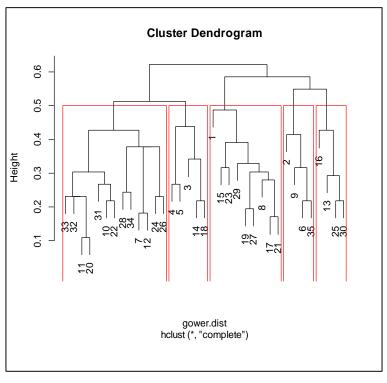


Figure 9 - Dendogram of Cluster analysis with cluster identification