APPAREL REPORT

Generations of Shoppers Ready for Change

ChangeUp

The Gen Z shopper scrolling on their phone in store isn't avoiding human contact—they're actually feeling overwhelmed and seeking guidance.

The Millennial parent with a toddler in tow isn't rushing through their shopping trip—they're carefully evaluating whether this brand aligns with their values and seeking meaningful store interactions.

And that **Gen X shopper** isn't just hunting for deals—they're evaluating whether this store's experience matches their expectations.

The Boomer methodically browsing the racks isn't settling for basics—they're hoping to find inspiration that retailers aren't providing.

Welcome to the reality of today's retail, where generational shopping behaviors are defying long-held stereotypes.

Our new research across 2,000+ apparel shoppers in the United States reveals surprising insights that challenge how retailers think about and serve different age groups.

All respondents regularly make apparel purchases in the physical store (at least every 3 months or more often.) They also purchase apparel in-store from at least one of the brands below.

American Eagle Outfitters, Dick's Sporting Goods, Gap, Walmart, Athleta, lululemon, Kohl's, Levi's, Nike, Old Navy, Target

This study was designed to represent a diverse cross-section of shoppers, balanced by age, gender, race, region, and income.

Common Generational Myths

Gen Z:
Carefree, digital dependents

Millennials:
Working parents too busy to care about the store

Gen X:
Convenience and price-driven shoppers

Boomers:
Unengaged and bored big-box store shoppers

MYTH:

Gen Z are carefree, digital dependents

Gen Z Myth: carefree, digital dependents

Despite being digital natives, just as many Gen-Zers regularly make in-store purchases for apparel as they do online.

64%	vs.	66%
physical store		online

Gen Z Myth: carefree, digital dependents

The **physical store stresses and overwhelms Gen Z,** more than older generations. Many don’t think stores have evolved to meet their needs. Even more, their **frustration pushes them to shop online.**

50%

feel in-store shopping is stressful

42%

feel overwhelmed by the many choices in the store

39%

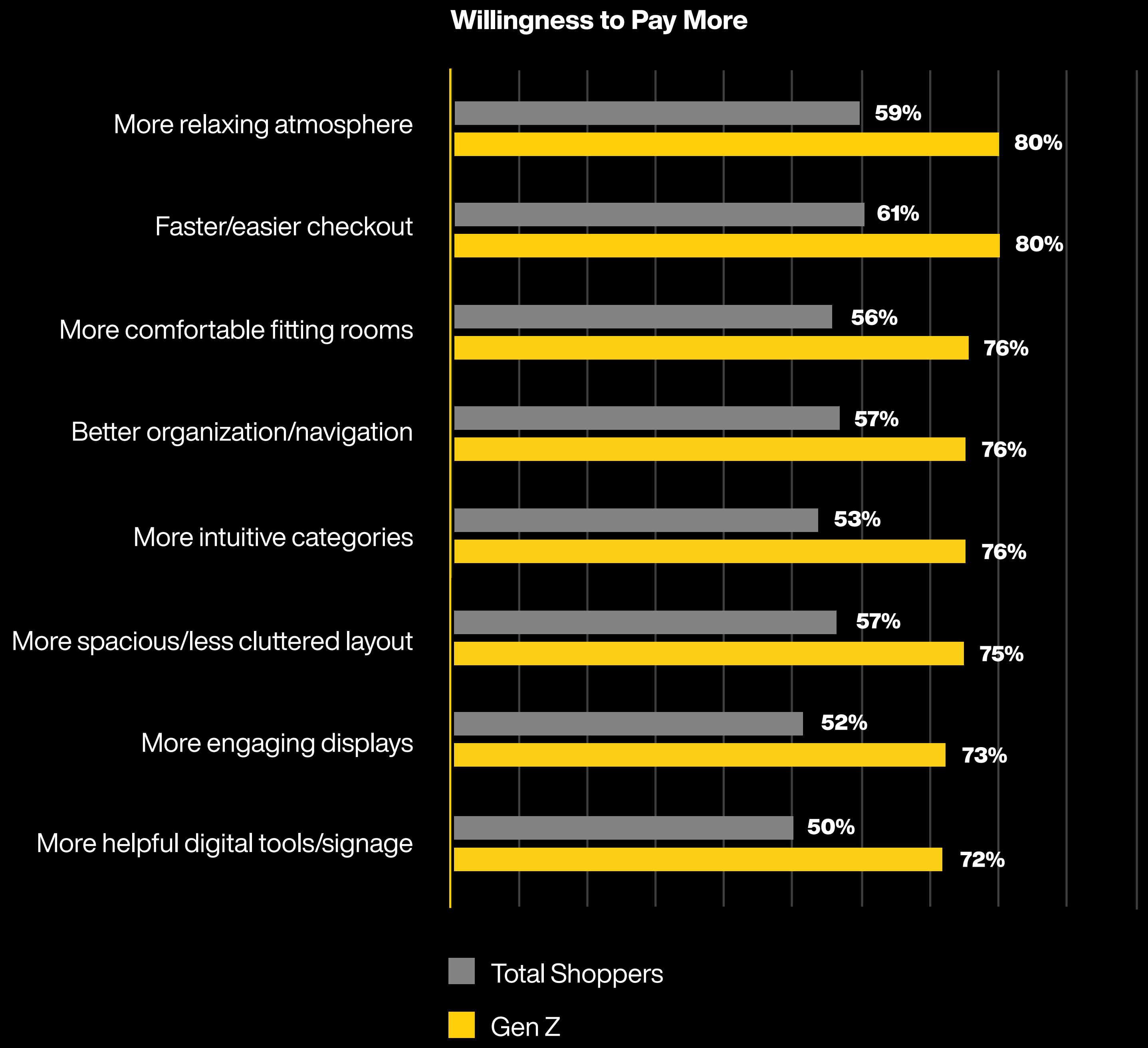
agree physical retail has not evolved to meet their changing expectations

46%

say their negative in-store experiences pushes them want to shop online

Gen Z Myth: carefree, digital dependents

Despite having the least wealth, Gen Z is the most willing to pay for better in-store experiences.



MYTH:

Gen Z are carefree, digital dependents

REALITY: The Anxious Shoppers

Digital natives with analog anxiety—they want physical retail but feel overwhelmed by current store designs.

MYTH:

Millennials are working parents who are too busy to care about the store

Millenials Myth: working parents too busy to care about the store

In actuality, they are consciously engaged while shopping—choosing stores that align with their values, trying on new styles, and enjoying staff interactions—more than any other generation.

68%

feel store environments make them confident to try new styles

63%

prefer stores that align with their personal values

57%

enjoy personal interactions with store staff

Millenials Myth: working parents too busy to care about the store

The in-store experience can positively or negatively influence their perceptions and behaviors.

59%

have certain stores I'd never shop based on store experience

66%

think poor store organization negatively impacts my shopping behavior

61%

feel a store's design impacts my perception of product quality

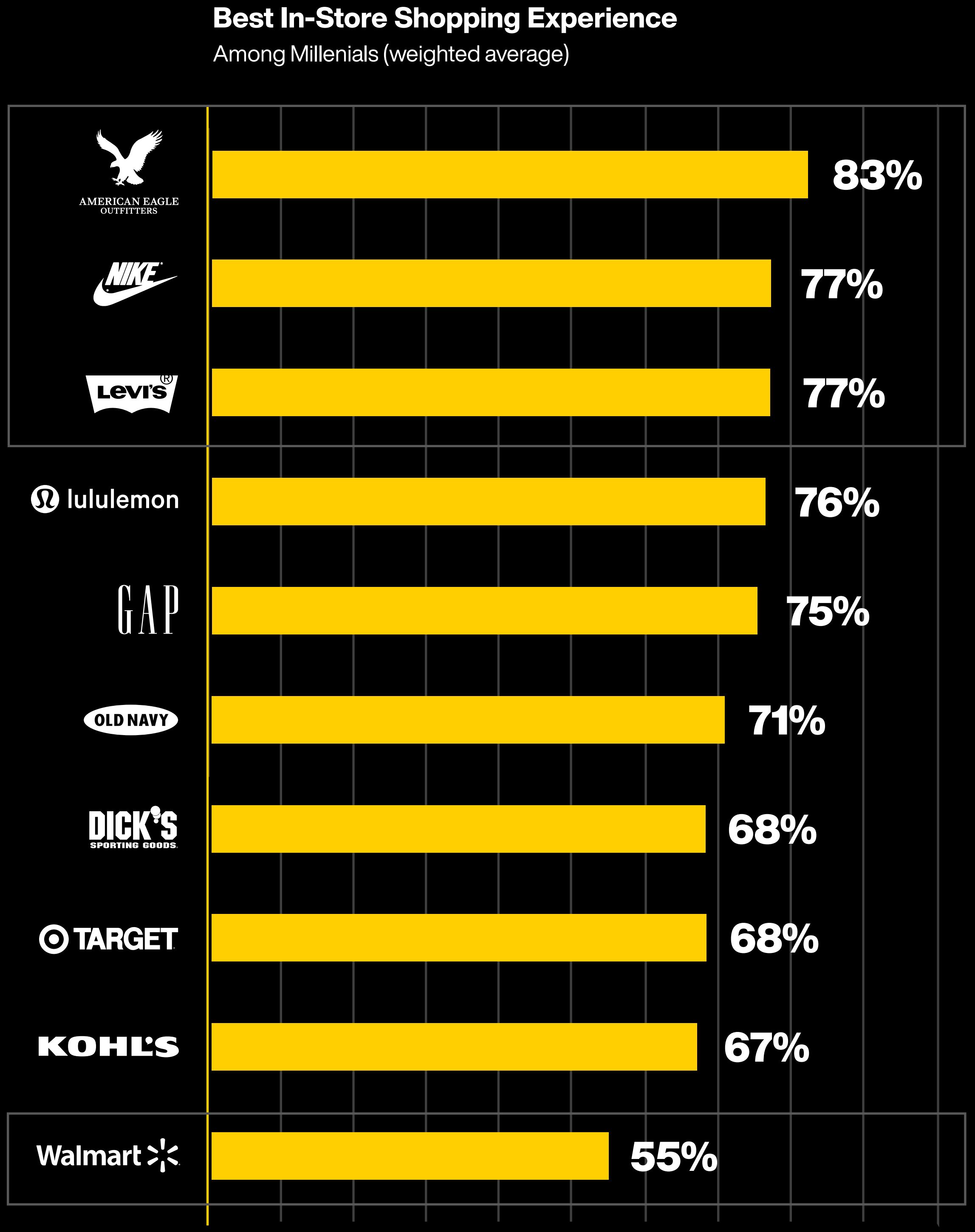
72%

agree the quality of in-store experience influences where I choose to shop

Millenials Myth: working parents too busy to care about the store

Among Millennials, **American Eagle, Nike and Levi's** have the best in-store experiences.

They rate Walmart the lowest.



MYTH:

Millennials are working parents who are too busy to care about the store

REALITY: The Conscious Consumers

Don’t mistake their efficiency for disengagement—they are retail’s most conscious consumers.

MYTH:

Gen X are convenience and price-driven shoppers

Gen X Myth: convenience and price-driven shoppers

While price and convenience will always be important, other aspects influence their shopping behavior too.

In fact, few Gen Xers will put up with a negative store experience just for cheaper prices. Even less will switch to buy apparel online just because it's cheaper or more convenient.

only 33% will put up with a poor store experience to save money

only 23% will switch and buy online if they can get it cheaper

only 20% will switch and buy online if the store takes too long

Gen X Myth: convenience and price-driven shoppers

They are actively browsing and discovering inspiration while shopping. Most agree they shop more at stores that put them in a good mood.

62%
often browse without a specific purchase in mind

62%
regularly discover new style inspiration while shopping

71%
shop more often at stores that put them in a good mood

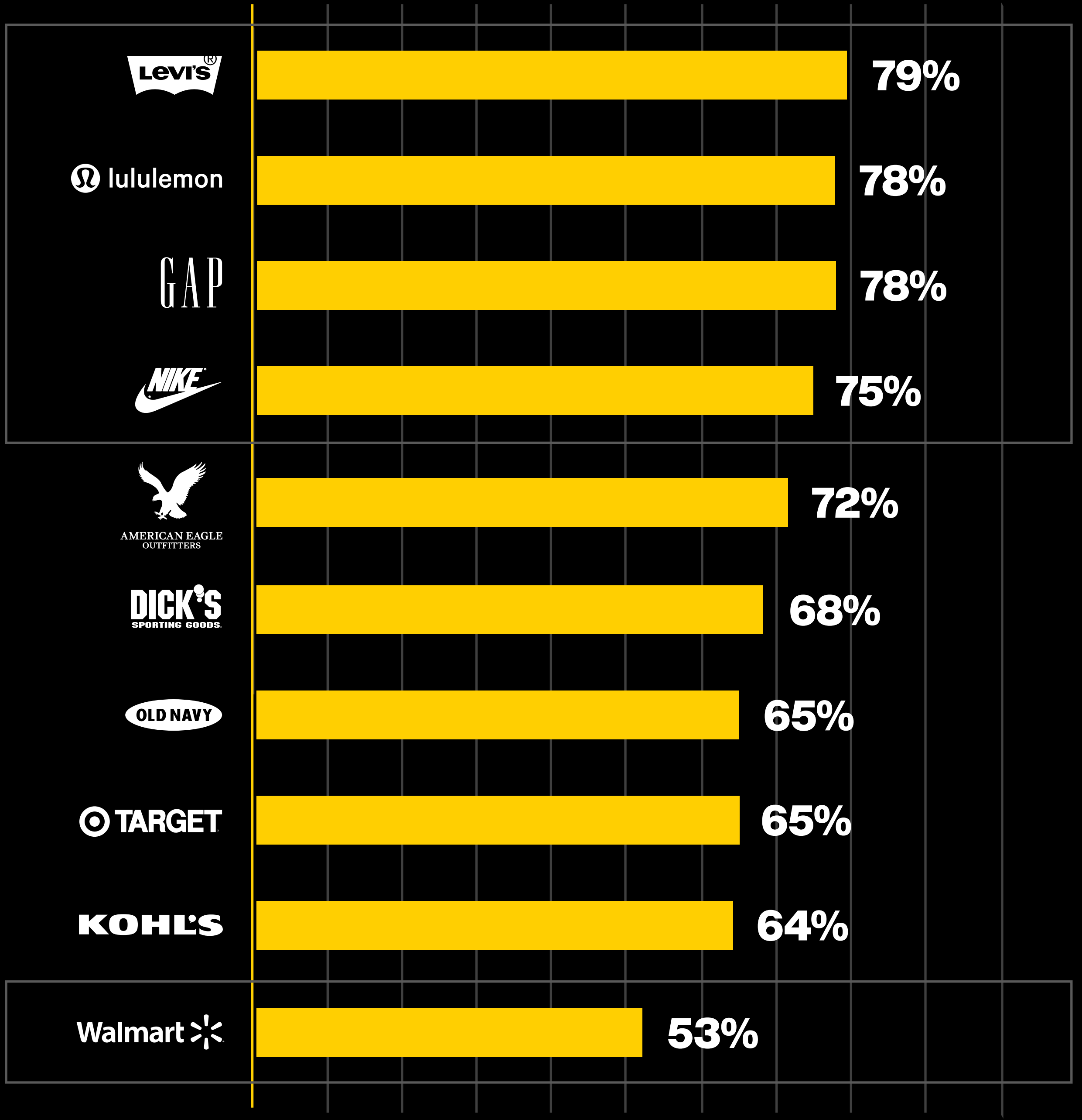
Gen X Myth: convenience and price-driven shoppers

Gen X is most **inspired by specialist brands like Levi's, Lululemon, Gap, and Nike's** physical stores.

Not surprising, Gen X is least inspired when shopping in Walmart.

Retailer's Physical Stores Inspire Me

Among Gen X (weighted average)



MYTH:

Gen X are convenience and price-driven shoppers

REALITY: The Misunderstood Value Seekers

They’re not just bargain hunters, value and experience trump price and convenience.

MYTH:

Boomers are unengaged and bored big-box store shoppers

Boomers Myth: unengaged and bored big-box store shoppers

While most report feeling positive while shopping, Boomers' emotions differ slightly from other generations. **More Boomers feel misunderstood...**

40% feel hopeful while shopping, the highest of any generation

37% feel confident while shopping, the lowest of any generation

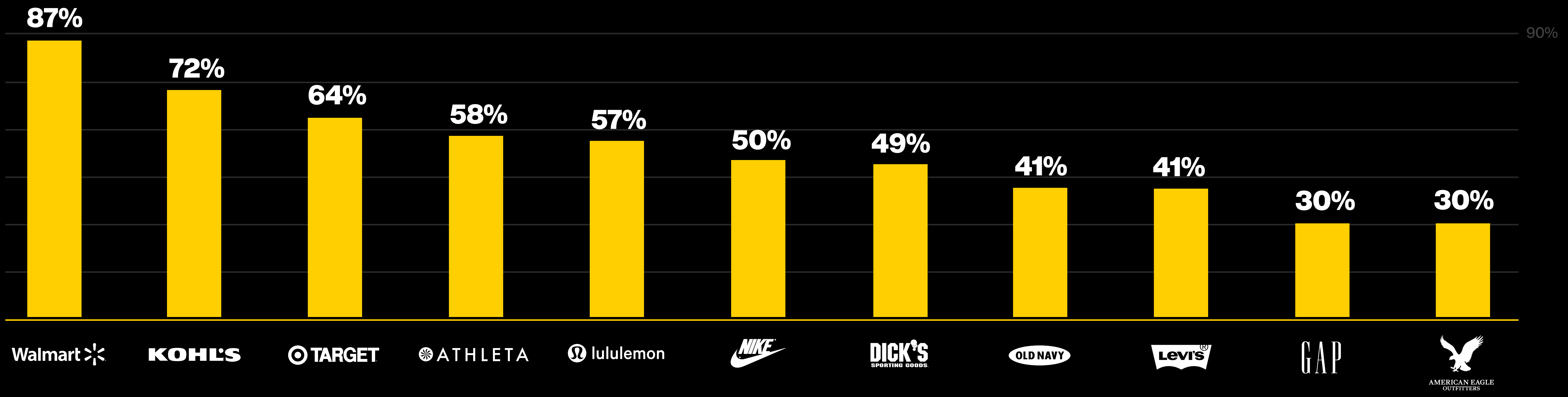
only 37% rate retailers' stores well for understanding them/their style needs

only 33% rate retailers' stores well for inspiring them

Boomers Myth: unengaged and bored big-box store shoppers

While big-box stores are popular, they buy apparel from all types of stores/brands. Surprisingly, **50%+ have purchased from specialist brands like Athleta, Lululemon, and Nike** in the past year.

% Purchased Apparel in Past Year
Among Boomers in-store and/or online



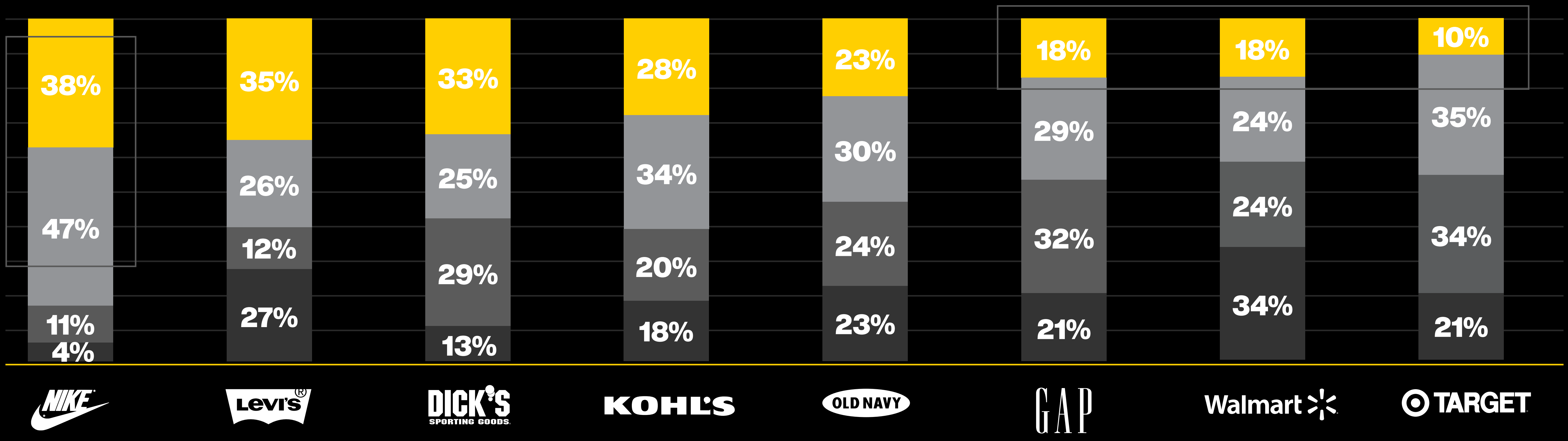
Boomers Myth: unengaged and bored big-box store shoppers

Where they love to shop varies, but they love shopping at the Nike most. Walmart, Gap, and Target get the least love.

Love it
Enjoy it a lot
Enjoy
Sometimes/do not enjoy it

Shopping Enjoyment in Brand's Physical Stores

Among Boomers



MYTH:

Boomers are unengaged and bored big-box store shoppers

REALITY: The Inspiration Hunters

Far from disengaged, Boomers are inspiration seekers stuck in uninspiring spaces

The MVP Brands

So, which brands are delivering the best in-store experience for each generation?

Gen Z:
The Anxious Shoppers

Millennials:
The Conscious Consumers

Gen X:
The Inspiration Hunters

Boomers:
The Misunderstood Value Seekers

Our research reveals why some retailers succeed while others struggle.

- Nike's and Levi's success across generations stems from **clear category organization and focused storytelling.**
- Retailers like Lululemon win with **curated selections and purpose-driven environments.**
- Meanwhile, **traditional department stores and big-box retailers,** despite massive investments in digital tools and displays, often **score lowest for shopping enjoyment.**

The data reveals two distinct paths forward in apparel retail.

1. Specialty retailers:

Success lies in creating focused environments that amplify brand storytelling and tailored shopping experiences that cater to how they prefer to discover and interact with products. Our research shows shoppers will pay more for well-designed, meaningful retail space. But "better" demands understanding exactly what your specific customer segment values in the shopping journey.

2. Big-box retailers:

The challenge is more complex: how to create clarity and connection within vast assortments. Our data shows even value-oriented shoppers won't tolerate bad experiences for lower prices. Yet the highest-performing big-box retailers prove that scale and experience aren't mutually exclusive. Leading big-box retailers succeed by carving out distinct shopping zones that respect both their brand position and their shoppers' cognitive bandwidth.

The data points to three critical principles for apparel retailers:

1. Master the Basics Before Adding Complexity

While most retailers are focused on heavily investing in digital tools, shoppers are willing to switch stores for simple improvements:

68%

will switch for better store organization and navigation

64%

will switch for better fitting room experience

Getting these retail fundamentals right matters more than adding new technology.

The data points to three critical principles for apparel retailers:

2. Edit for Impact

Less is more -overwhelming choices frustrate shoppers. Nike's and Levi's success proves that well-organized, focused selections outperform cluttered floors and racks that are poorly presented.

Almost 60% of their shoppers are **very satisfied** with the stores' **organization** which results in about half of their shoppers feeling **confident** while shopping.

The data points to three critical principles for apparel retailers:

3. Align Environment with Intent

Retailers who match store environments to shopper mindsets excel. Shoppers report:

- About 80% of Millennials **feel they and their style is understood** by Levi's, American Eagle and Gap.
- About half of Gen X are **very satisfied** with Nike, Levi's, and Lululemon for being the **authority for what they want.**

The Greatest Surprise?

When retailers truly understand how their target shoppers want to experience their products and brand, **design decisions become clearer, investments become more focused, and shopping environments become more profitable.**

The future belongs not to retailers who make the most noise, but to those who will **listen, adapt, and design spaces that resonate most deeply with and truly serve their shoppers.**

Get in touch for additional shopper insights on the featured brands and more.

About ChangeUp

ChangeUp is an award-winning experience agency designing for the moments where brands and customers meet. We develop brand-led experiences that create change for businesses through strategy, brand design, store design, and architecture. We drive change for fast-moving brands, from startups to the F500, working with clients including Stop & Shop, The Vitamin Shoppe, Best Buy, Bath & Body Works, Panda Express, bp, and Kia.

We believe change is not a risk, it's the answer.

let's talk

retail@changeupinc.com
844 804 7700