

F A I R E

How Gen Z shops

Blending brick-and-mortar with
e-commerce for a new generation

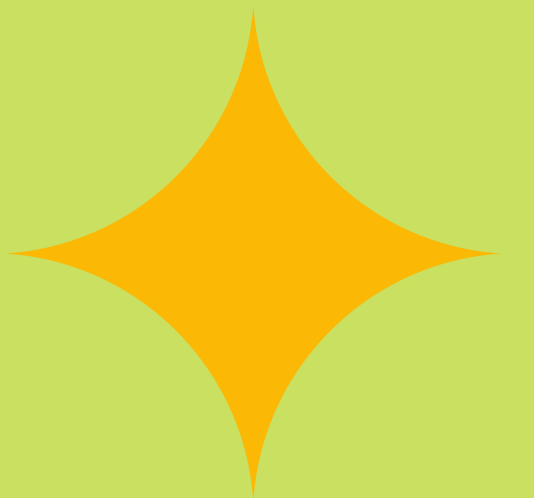




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Gen Z's search for optimism amid tough times

The cultural context shaping Gen Z's shopping habits

The way we shop is part of the way we live, but every generation lives differently. Gen Zers, the world's first digital natives¹ and most diverse cohort to date,² have long drawn retailers' attention for how different they are from their older counterparts, whether Boomers, Gen Xers, or even the millennials that immediately precede them. But now, as more members of Gen Z enter the workforce and drum up spending power, they're becoming a more central focus for retailers. Spanning ages 11 to 26 with an estimated \$360 billion of disposable income, this generation's overall heft will only expand in the coming decade as younger Gen Zers reach financial maturity.³

Against this backdrop, retailers are rethinking how they fit in to serve Gen Z's needs—particularly how to navigate e-commerce and brick-and-mortar to tap into the best of online and offline offerings. With this in mind, Faire has conducted research into Gen Z shopping habits in the context of online-offline divides, specifically focusing on the older end of this generation (those who are of working age and have their own income).

Using cultural insights research and a survey of 1,000 adult Gen Z consumers, this report breaks down how independent retailers can adapt to this shifting landscape—from how brick-and-mortar spaces are evolving to how online spaces are pioneering new cultures and how the two offerings are being blended to create the future of retail.

To understand Gen Z's shopping preferences, we first have to zoom out—looking beyond the act of shopping itself to the wider attitudes toward spending and value. On a baseline level, Gen Z's approach to retail is being shaped by a tension: They're shopping to quell their stress, but they're stressed about how much they spend. In a culture of retail therapy, 74% of Gen Z admit to buying things online that they didn't need simply because they were easy to purchase.⁴ But at the same time, 91% say the cost-of-living crisis has affected the way they shop,⁵ with 45% of social media users seeking out money-saving content.⁶

This tension around spending is leading to a reappraisal of what “value” means to Gen Z shoppers. Forty-five percent of Gen Z “don’t see a point in saving until things return to normal,” suggesting that “normal” approaches to spending, saving, and value have been suspended.⁷

One result of this is that Gen Z consumers aren’t focused on long-term investments but rather on purchases designed to make them happy in objectively hard times. Many of these behaviors fit under the banner of “little treat culture”: a movement popularized on TikTok through hashtags like #littletreat (49.5 million views) and #treatyourself (3.3 billion views). For a generation that isn’t saving its money for far-off milestones like homeownership and retirement, this trend instead celebrates small indulgences, like enjoying the instant gratification of splurging on an overpriced iced coffee.

Psychologists have noted that for a cohort that’s working hard to find optimism in tough times, “little treats” are like microdosing good moods in that they stimulate dopamine.⁸

This small-scale, happiness-oriented approach to spending explains why young adults who can’t afford to move out of their parents’ homes are driving a boom in the luxury sector and why they’re creating a renaissance for playful collectors’ items, like retro Barbie dolls and toy sets.⁹ When financial stability and major life purchases are off the table, there’s outsized joy in a small luxury or the act of completing a collection.

Beyond rethinking the value of long-term investments, Gen Z is also rethinking the value of brands. On TikTok, the #dupe hashtag (5.6 billion views) celebrates alternative replicas of branded items, from knockoffs of luxury soap to copycat perfumes, while the de-influencer movement, in which influencers make videos describing products that aren’t worth the hype, has shown Gen Z the value of knowing what not to buy.¹⁰

As this wider “value” landscape shifts, the retail landscape is adapting to these new considerations around money and how to spend it.

“Gen Z consumers aren’t focused on long-term investments but rather on purchases designed to make them happy in objectively hard times.”

The pandemic’s pendulum swing toward e-commerce is swinging back toward in-person shopping. Brick-and-mortar sales grew faster than e-commerce sales in 2021 for the first time ever¹¹—in part, a product of Gen Zers’ realization that they’re more discerning offline, with 49% saying they spend more wisely when shopping in person and 40% saying they’re more confident in purchases made in person.¹²

With this in mind, this report looks at how independent retailers can respond to serve Gen Z’s needs—looking at the evolution of brick-and-mortar, e-commerce and social media, and blended online-offline offerings that are defining the future of retail.



IRL

How Gen Z shops in person

Brick-and-mortar shops are
evolving to suit Gen Z's needs



INSIGHTS FROM
A RETAIL EXPERT

“ Younger generations have long gravitated to in-person shopping experiences for community, self-expression, and the joys of real-life discovery. Decades ago, this was centralized around malls, an absolute boon for retail given the sheer amount of time (and aggregate dollars) younger demographics allocate in pursuit of social and cultural fulfillment. While enthusiasm for malls has waned in recent years, the desire for community and discovery persists.

Boutiques and independent retailers, from home accessory concept stores to third wave coffee shops selling toasts and vintage clothes (with lines out the door), have become today's gathering hubs. Gen Z is, sadly, a generation that's proving prone to loneliness and isolation, often driven by technology. But they are also highly individualistic. It makes perfect sense that they see brick-and-mortar boutiques and independent retail as modern outlets for connection and experimentation. ”



Kirsten Green

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Kirsten Green has over 20 years of experience investing in and partnering with consumer-focused companies. She sits on the Board of Directors of Nordstrom, Glossier, Faire, and more.

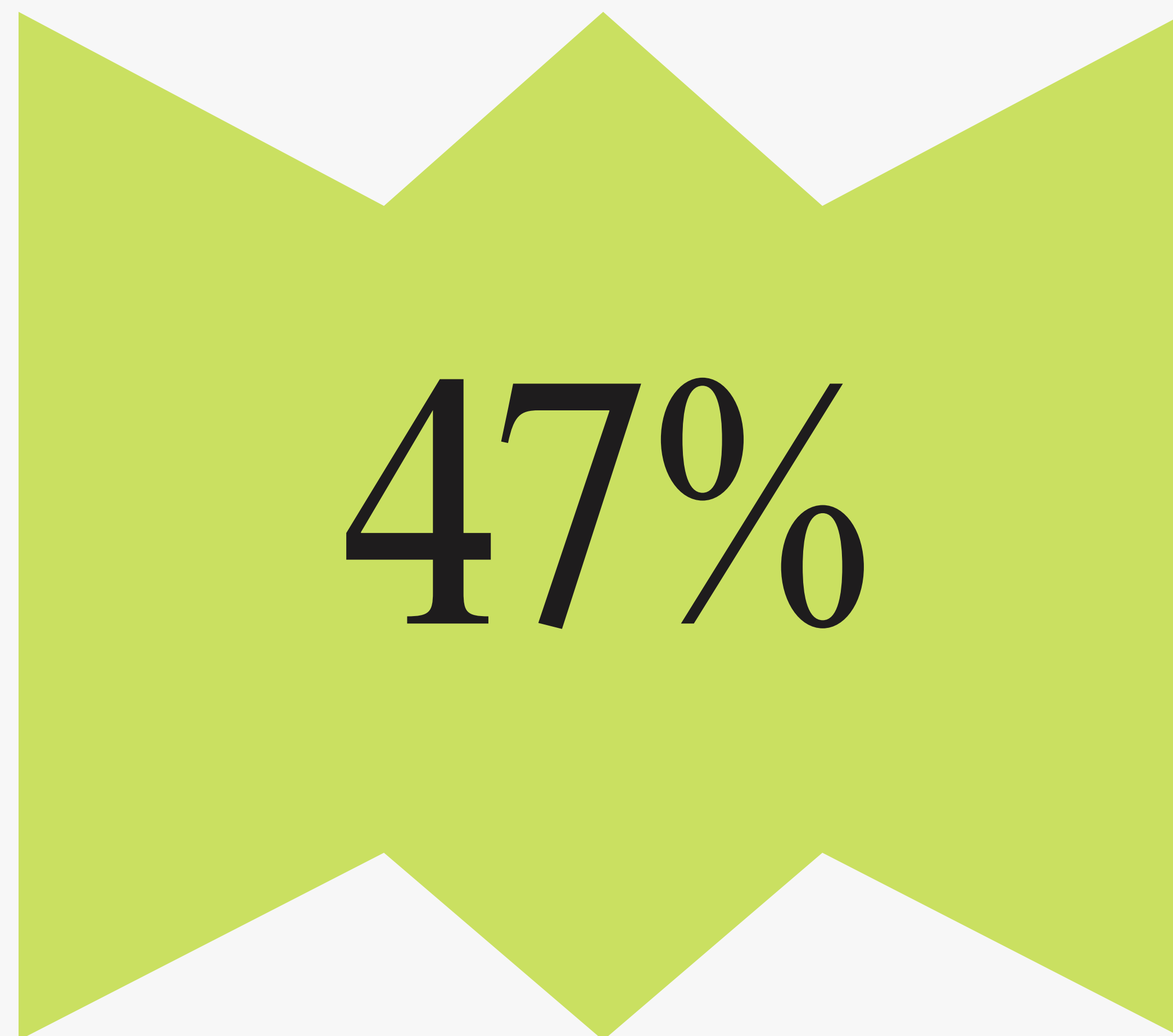
The ritual of in-person shopping is alive and well—in the wake of the pandemic, there’s huge demand for real-life experiences, and Gen Z is the most in-store hungry of all. A whopping 47% say they prefer to shop in-store than online, more than any other demographic.¹³

Part of this is down to a wider cultural wave of nostalgia among Gen Z. Research has shown that nostalgia—a well-known motivator for spending—is particularly potent during times of crisis.¹⁴ Given Gen Zers’ grounding in an era defined by crises, it’s no surprise that a lust for “the old days” (even for time periods they haven’t actually experienced) is driving their approach to consumption.¹⁵

Nostalgia is affecting what Gen Z is buying—from wired headphones¹⁶ and retro homeware¹⁷ to massive cultural movements like the Y2K fashion revival.¹⁸ It’s also impacting how they shop, with a yearning for the American mall culture of yesteryear, particularly the mall’s former role as a social hub and collective experience.¹⁹

In addition to this vision of in-person shopping as a return to the past, it’s also a move into the future. Retailers have been zeroing in on the Gen Z values that overlap with in-person experiences and revamping their brick-and-mortar offerings to cater to these.

One of these major areas of overlap is the experiential. Amid a culture-wide focus on experiences in the wake of the pandemic,²⁰ many Americans are looking to brick-and-mortar as the answer, with 44% viewing in-person shopping as “an event”²¹ and 34% of Gen Z making a full day of it when they shop in person.²² This school of thought is shaping the structure of retail shops, from megamalls to independent retailers. While malls are being redesigned to feature attractions like microbreweries and beekeeping,²³ many independent retailers are shifting in-store offerings away from product stock and toward product experiences, from P.F. Candle Co.’s customer workshops in Los Angeles to The Silver Room’s book-signing events complete with DJ sets and author talks in Chicago.²⁴



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61%

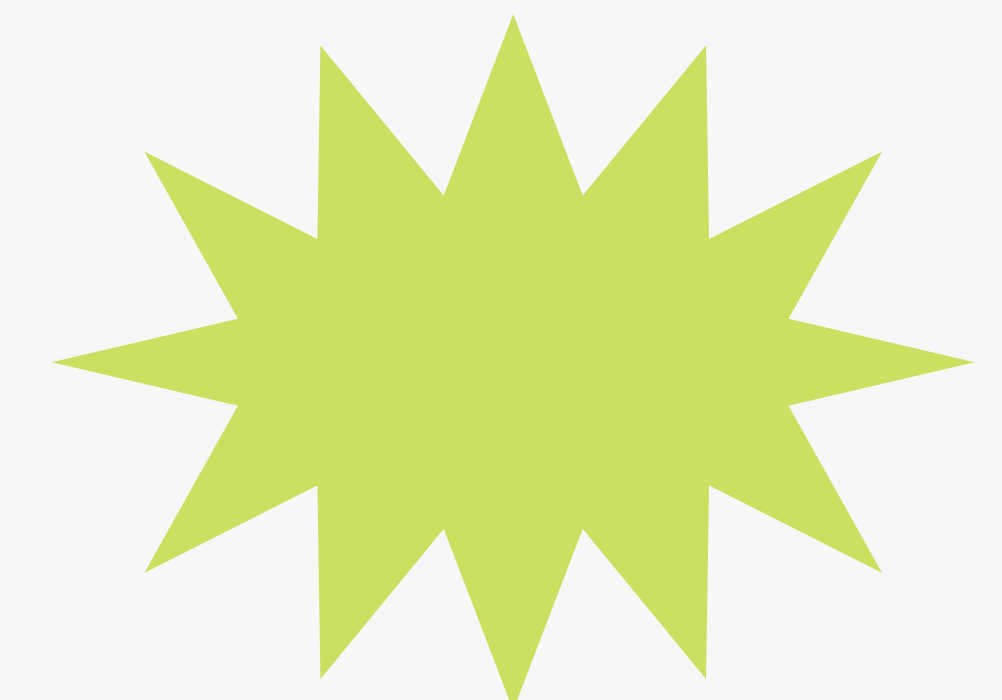
of Gen Z shoppers are more likely to shop in person than online compared to a few years ago.

Crucially, “experience” isn’t just about elaborate events—it’s also geared around simple discovery that taps into the senses.²⁵ From feeling the grain of a fabric or the weight of a piece of jewelry to smelling the scent of a candle, much of the experiential aspect of shopping comes from senses beyond the visual. As Sally Morrison, PR director of jewelry retailer De Beers said, “There is a magic [to holding a product] that could never be replicated in a purely digital experience.”²⁶ For independent retailers whose focus is on craftsmanship—something that often requires all senses and an up-close view to appreciate—this carves out the clear value of brick-and-mortar.

Beyond the experiential, brick-and-mortar shopping is also seen as a space for “meaningful connection,” whether that’s connecting to a retailer’s narrative or with a wider shared community around a store or brand.²⁷ This desire for connection leads 61% of Gen Zers to be more likely to shop in person now than a few years ago, with 37% placing more value on what they purchase when shopping in person, showing how products become more meaningful in the context of a shop.²⁸

This quest for meaning and connection makes sense for Gen Z—a cohort that struggles to build lasting friendships²⁹ and is being called the “loneliest generation.”³⁰ Now, with much of work and school life happening online, brick-and-mortar spaces are stepping in as the unsung heroes of community—32% of Gen Zers prefer to shop in person versus online because they’d rather not shop alone.³¹

Retailers like Aimé Leon Dore (ALD)—a fashion house with cult status among Gen Z—are famed for using their shops to help patrons connect both with the brand’s story and one another. “When you’re buying into ALD, you’re buying into a world ... not a garment,” said Teddy Santis, its founder.³² This comes through in the shop’s framing: designed more like a cozy living room or dimly lit private club than a sales floor, ALD’s shops and cafés are small spaces geared around indulging in a shared identity and community, rather than shopping per se—and Gen Zers are lining up around the block.





CASE STUDY

Tula House

Plant shop

Christan Summers and Ivan Martinez—the husband-and-wife team behind Brooklyn-based Tula House—started their plant business in 2016. Summers got the idea to open a store while working in advertising in New York City. “I saw this huge opportunity for education and retail—a different type of plant shop,” Summers says. The duo managed to open the business in a former ice cream truck. “We retrofitted this funky truck into a beautiful greenhouse on wheels,” Summers says. The business operated out of the truck for about three years before they opened their retail space.

Now they describe their business as more than just a plant and design company, but rather as a botanical experience. “We were grass roots from the start and had a lot of face-to-face time with each and every customer. We still have customers who we met seven years ago on the truck who now frequent the storefront.”

For Summers, camaraderie and community are the best parts of owning a small business in Brooklyn. She loves how the local shops work together, help each other out, and host community events in her neighborhood of Greenpoint. Tula House customers also tend to live locally and enjoy the experiential, socially interactive nature of the business. “People come in here a few times a week, and we know their names, we know their kids, we know their dogs,” she says. “In the world that we live in, that level of community is just so wonderful.”

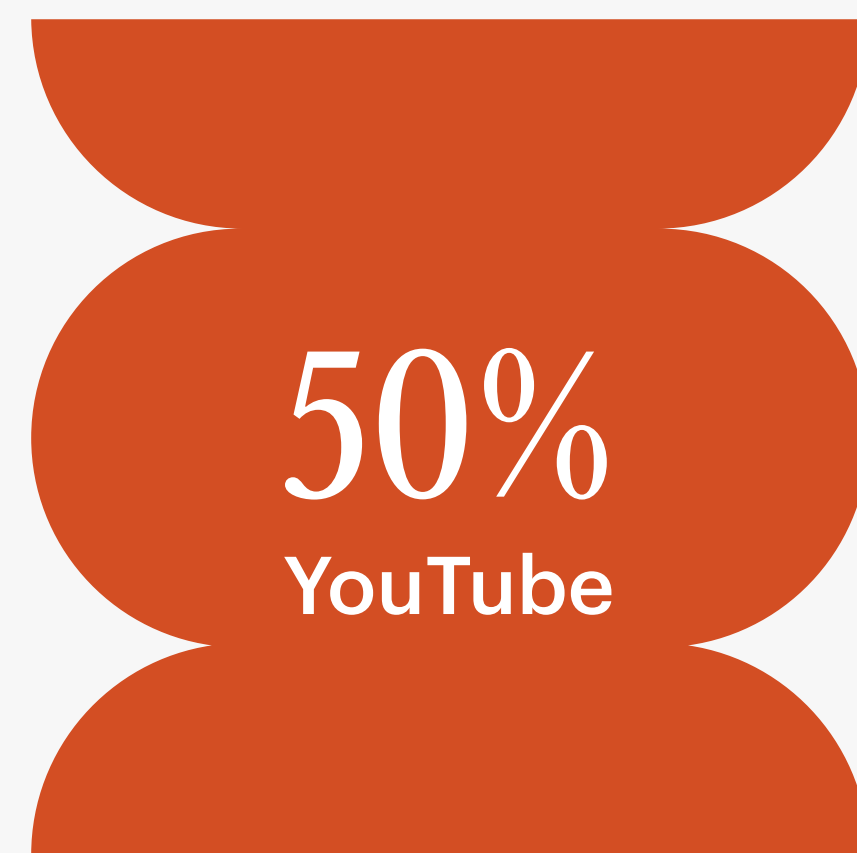
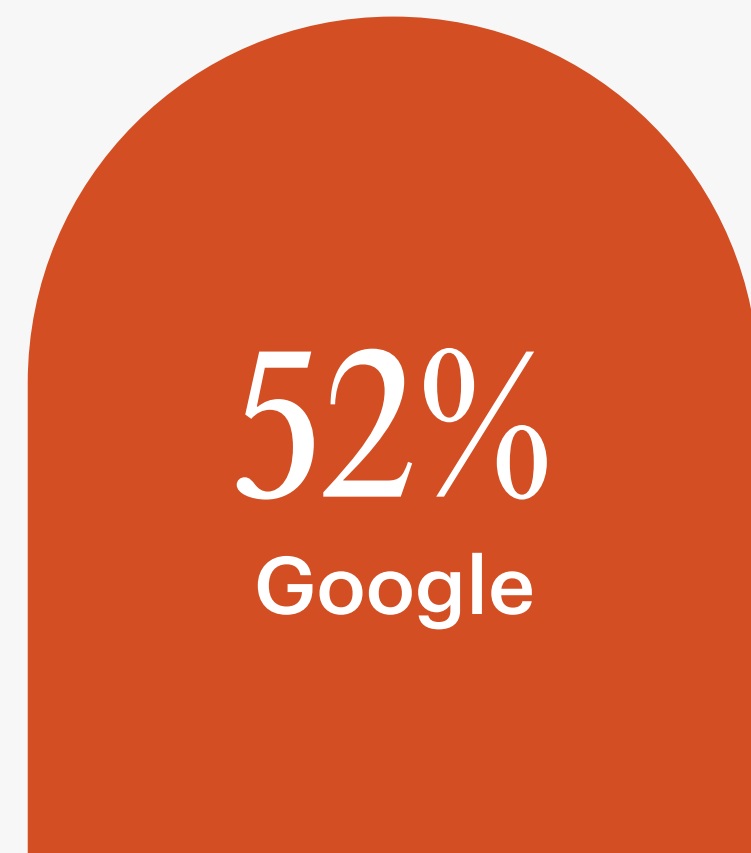
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How Gen Z shops online

E-commerce still fits into Gen Z's consumer habits, dovetailing with offline shopping



Gen Z consumers turn to online channels to discover new products and services, including:



E-commerce plays a very different role for Gen Z than it does for its older counterparts. While previous generations often have a fixed mindset on the role e-commerce serves, Gen Z is reevaluating what’s “normal” to do online, from ordering fine jewelry without trying it on to chatting to retailers on WhatsApp.³³

But it’s more complex than saying Gen Zers prefer to shop online—instead, on- and offline retail are each seen as suited to certain types of shopping journeys. E-commerce’s “quick and anonymous” framing makes it the obvious choice for purchases that are led by necessity, not enjoyment. And for enjoyment-focused purchases, from gifts for others to personal treats, e-commerce has a distinct role: With 41% of Gen Zers saying they gather ideas by browsing online, despite mostly not completing their purchase there, e-commerce is often seen as the space for inspiration, rather than execution.³⁴

This is part of a wider shift in purchasing journeys: Today’s young shoppers are more focused on extensive “search and discovery” phases before they commit to spending.³⁵

In a survey conducted by investment firm Forerunner Ventures, three-quarters of Gen Z consumers reported spending between “a few hours” and “a few days” researching an item before buying—saying they use channels including Google (52%), YouTube (50%), TikTok (45%), and Instagram (44%) to discover new products.³⁶ Online shops are the perfect arena for this, which is a boon for independent retailers with small brick-and-mortar footprints. In their digital presence, they’re able to widen the scope of their display.³⁷ In turn, they’re widening a shopper’s exposure to tastes and styles they wouldn’t necessarily have come across in person—offering the identity-driven generation a chance to differentiate themselves from the products seen in local stockists.

Beyond its role in quick purchases or gathering inspiration, e-commerce can also be its own form of entertainment—particularly for a generation that’s turning away from TV and toward social media for leisure time. If in-person shopping fills the role of active entertainment, online features like product hauls, “get ready with me” videos, and livestream shopping events are replacing TV as Gen Z’s go-to form of passive entertainment.³⁸



74%

of Gen Zers admit to buying things online that they didn't need simply because they were easy to purchase.

Product haul videos—short pieces of content in which someone walks an audience through a series of things they bought, offering commentary and description—have inspired 42% of Gen Z to make a purchase.³⁹ And “get ready with me” videos on TikTok, which invite viewers to watch the process and products of a creator’s styling, hair, and makeup routines, have a staggering 127 billion views⁴⁰ on the platform. According to Forerunner Ventures, over a quarter of Gen Zers call TikTok their primary place for discovering new products and services.⁴¹

Livestream shopping events—in which retailers and shoppers gather on platforms like Instagram to buy and sell products in real time—are drumming up Gen Z’s excitement by turning the sales process into an interactive form of entertainment between shopper and seller. Manish Chandra, chief executive of e-commerce platform Poshmark, notes that “there’s just an insane level of excitement that we have seen. In a very few short months, [our livestream hosts are] proving that this form of live shopping works.”⁴²

Because these modes of “e-commerce as entertainment” are highly engaging but require relatively little cash or space, they’re an opportunity for independent retailers to gain ground against big businesses. In fact, big businesses often put extra investment into trying to seem more like small, independent retailers because of social media culture’s emphasis on authentic, human stories. It’s why Poshmark foregrounds its individual sellers in livestreams,⁴³ while large-scale UK beauty retailer Justmylook has launched a TikTok presence detailing the behind-the-scenes antics of two goofy employees, cultivating the human presence that independent retailers naturally have.⁴⁴





CASE STUDY

Humboldt House

Home goods and lifestyle shop



Humboldt House is a Chicago-based community shop featuring locally made goods. Owner Claire Tibbs graduated from Lake Forest College with a degree in studio art and began working in contemporary art galleries. When she opened Humboldt House, she wanted to pair her love for art, design, and vintage finds with a community-oriented feminist focus. “Galleries are a gathering space for like-minded folks to come together and feel inspired. I try to retain this ethos at Humboldt House,” says Tibbs.

The shop opened in 2013 as a vintage store and then slowly evolved over the years into what it is today. Part of that evolution included launching a thoughtfully curated, well-designed e-commerce shop.

Plus, somewhere along the way, the business amassed 40,000 followers on Instagram. Despite having a small team, Tibbs employs a social media manager to cultivate and manage the shop’s online following.

The shop’s Instagram account is full of reminders that shoppers can browse online 24/7—perfect for Chicago winters—in addition to shopping in-store. When customers head over to the Humboldt House website, they find inspiring visuals from merchandising shots to stellar product photography—a must for any e-commerce presence.

Tibbs’s biggest piece of advice for fellow independent retailers? “Get a website!”



Blending brick- and-mortar with e-commerce

Retail is blending on- and offline offerings
to suit Gen Z's consumer behaviors



Despite having very different use cases and reputations, online and offline shopping aren't at odds with each other. For Gen Z, they're complementary—brick-and-mortar and e-commerce are best when they're combined to create a hybrid shopping experience.

It's why the majority of shoppers (51%) plan to shop for gifts with both online and brick-and-mortar retailers this holiday season.⁴⁵

This combination isn't about using high-tech digital features to replace in-person experiences—it's about finding simple ways for the physical and digital to work in tandem to give shoppers the best possible experience.

One notable example is using an in-person presence to forge online trust. Online shopping doesn't come with quality guaranteed—in fact, 43% of Gen Zers have returned part of an online shopping order due to quality issues.⁴⁶ With that in mind, 52% tend to shop online from retailers they already know and trust.⁴⁷

Especially compared to big-box e-commerce businesses like Amazon, which keep prices competitive by having no real offline presence, independent retailers are well positioned to use their brick-and-mortar shops to establish the human connection and personal touch that lay the groundwork for confidence in future online purchases.

Beyond establishing trust, simple digital tools can be used to support and simplify brick-and-mortar shopping. For example, "digital showrooms" leverage augmented reality to create interactive online experiences, letting shoppers explore products in a virtual room before going in-store to make a purchase.⁴⁸ Another is the "virtual fitting room" where shoppers can see a garment or accessory superimposed onto them to get a sense of style and fit,⁴⁹ the way eyewear retailer Warby Parker offers an online "try on" feature on its website.⁵⁰



51%

of Gen Z plan to shop for gifts with a combination of online and brick-and-mortar retailers this 2023 holiday season.

Lastly, the combination of on- and offline retail can extend and cement the community aspect of shopping. Matt Choon, owner of New York concept store Bowery Showroom, has noted how central community is in Gen Z's approach to retail.⁵¹ "Gen Z aren't just about buying the product," said Choon. "They want to collectively meet up with people who have similar interests."

This emphasis on social connection can come through purely in-person forms of shopping (like the use of brick-and-mortar shops as community hubs) or purely online forms (like the shared product recommendations in the comments section of influencer haul videos)—but blended retail offerings can take this community experience further. Savvy independent retailers are using channels like TikTok to tie together their online and in-person spaces, as with Illinois-based independent retailer The Neighborhood Trading Co., whose videos focus less on standard product recommendations and more on teasing imagery of the store's social atmosphere to inspire people to come visit and explore for themselves.

This is just one of many ways retailers are using content to pique shoppers' interest in brick-and-mortar shops. Online-first retailers, like sellers on TikTok and Poshmark, have hosted pop-ups⁵² or even turned the filming of their content into in-person events.⁵³ A recent Poshmark shopping livestream was hosted on a New York City rooftop, doubling as a cocktail party and mixer—showing how an e-commerce offering can become an opportunity for in-person collectivity.⁵⁴



CASE STUDY

The Neighborhood Trading Co.

Gift and clothing shop

The Neighborhood Trading Co. is a lifestyle store in Galena, Illinois, selling gifts by independent artists, trendy clothing, and more. Owner Austin Scott is a Gen Zer himself, giving him a unique edge when it comes to reaching young adults.

In particular, he uses social media to attract Gen Z customers to his brick-and-mortar store. Scott noticed that posting on his TikTok account—where he has nearly one million followers—was a useful way of engaging with customers. "With TikTok, I would film videos at the store and people started noticing products they liked in the background," he says. This led Scott to begin posting about the shop with the intention of getting viewers in the door.

Now, TikTok is at the core of Scott's retail strategy. Videos featuring behind-the-scenes interviews with customers and insights into a day in the life of a retail worker gain tens of thousands of views weekly. He also runs an Instagram account for the store where he shares frequent updates on new products and promotions with his 17,000 followers. Shoppers visiting his retail store will often say that they discovered his business on social media.

"I try to do subtle promotion," Scott says. "In this generation, nobody likes to be told what to buy or have anything shoved down their throats." When he does directly feature a product, it almost always sells out.

Takeaways and applications for independent retailers

Like Gen Z's escalating spending power, the possibilities for brick-and-mortar and e-commerce retail are ever-expanding. So how can independent retailers apply this research in their businesses?

Across the board, the key takeaways for resonating with Gen Z are to emphasize entertainment, foster community, and combine brick-and-mortar and e-commerce shopping features.

Reframe shopping as entertainment.

Across both online and in-person retail, there's an emphasis on "shopping as entertainment"—but what this looks like differs based on where it's taking place. Independent brick-and-mortar retailers can create simple, interactive experiences, from perfume libraries to gifting counters. When it comes to e-commerce, independent retailers know their products and customers well, making them well suited to social media offerings like product hauls, "get ready with me" videos, and livestream shopping events.

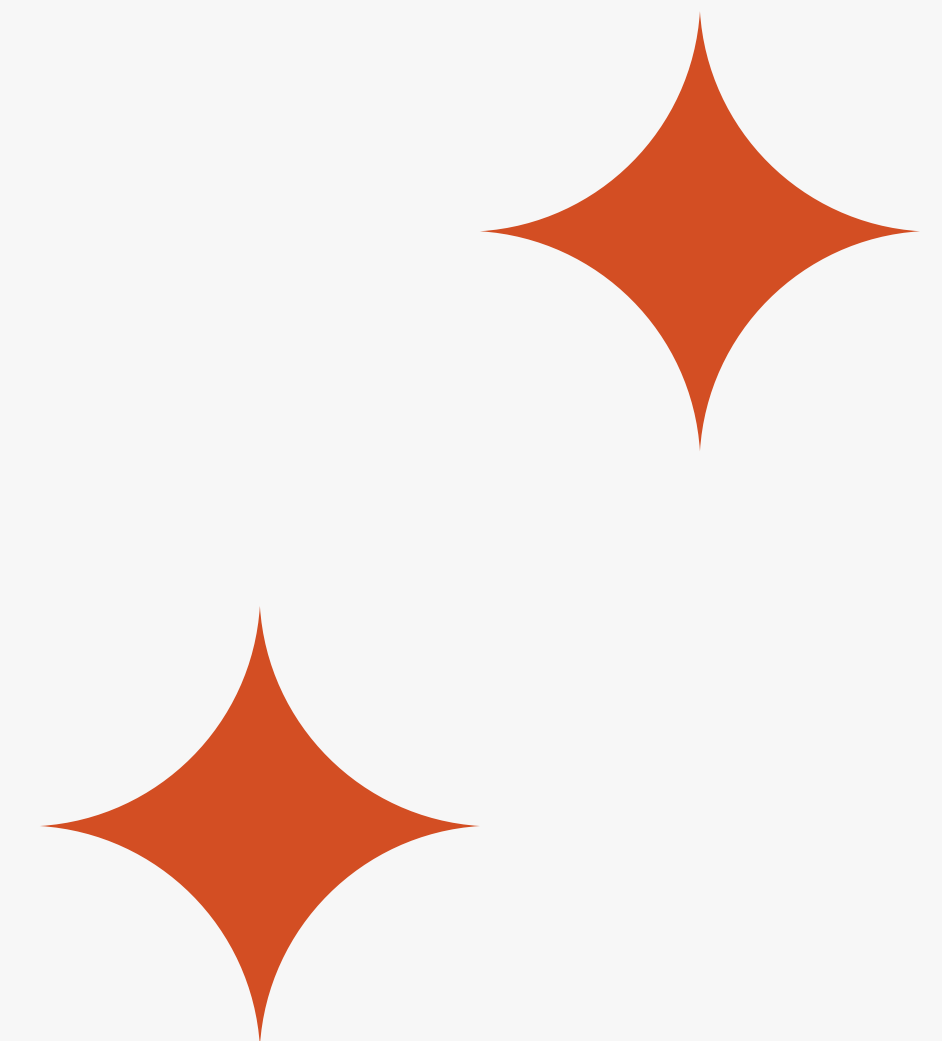
Foster community and connection.

Gen Z shoppers are looking to connect with peers and with a retailer's narrative. Independent retailers have a naturally strong sense of personality and identity, especially relative to big corporations—so they're well suited to creating spaces for shoppers to gather, whether online (like chat forums or the comments sections on TikTok and Instagram) or offline (like in-person events or workshops).

Use online and offline in tandem.

Gen Z sees online and in-person retail as mutually supportive, so retailers should think creatively about how these spaces can be used in easy ways to add value. Especially for independent retailers with smaller brick-and-mortar spaces that hold less stock, online offerings—for example, a lookbook or mood board that show products styled in different ways—help inspire shoppers (especially for a generation that often gathers ideas online but purchases in person).

Over the next 10 to 15 years, as more members of this generation enter adulthood and financial maturity, their shopping habits will increasingly shape the norms of brick-and-mortar and e-commerce retail experiences. With a naturally cultivated human presence and the ability to quickly adapt, independent retailers are well positioned to cater to Gen Z's evolving needs and preferences, both on- and offline.





Feeling inspired to see these ideas in action?

Start by helping Gen Z customers find products they'll value by stocking your shop with Faire.

About Faire

Faire is an online wholesale marketplace built on the belief that the future is local—now more than ever, consumers are choosing to support local shops over big-box chains. There are millions of thriving small businesses in North America and Europe alone. With our global community and the power of technology, Faire is helping fuel the growth of entrepreneurs everywhere. Learn more by visiting [Faire.com](https://www.faire.com).

Methodology

This report is underpinned by proprietary quantitative and qualitative research. A survey was conducted by Wakefield Research on Faire's behalf among 1,000 nationally representative adults in the U.S. aged 18 to 26. Survey data has been weighted and paired with research spanning reputable secondary sources—existing journalism and cultural analysis, academic research and peer-reviewed studies, trend and futures reports, and quantitative evidence—followed by original analysis and case studies to illuminate cultural shifts and their applications to retail.

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