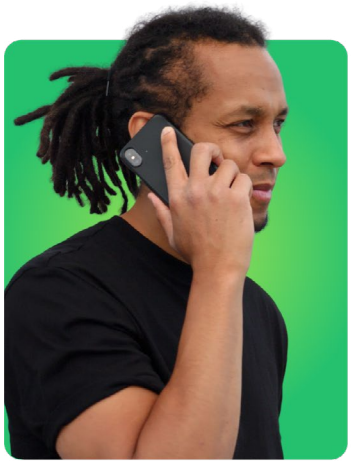

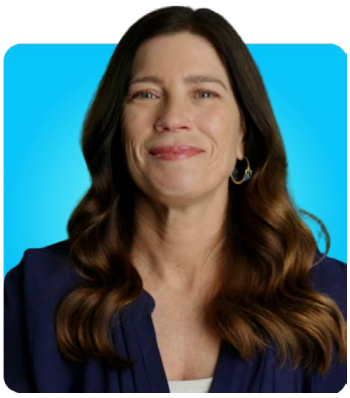

DIGITALISATION IN THE NEW NORMAL:

Empowering Generation Z and Millennials to Deliver Change

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Executive Summary

This research explores the impact of digitalisation on Generation Y ('Gen Y', (*Millennials*)) and Generation Z ('Gen Z') as change agents in the workplace and society in a post-pandemic environment. Primary research was undertaken with a sample of 200 Gen Y and Gen Z from the UK, France, Germany, Sweden, and Norway to explore 24 themes relevant to their workplace and brand requirements and activities. The themes have been selected from the results of ongoing cohort research by the LSE Team commencing in 2010 and extending into, during and after the pandemic. The themes are topical and include factors affecting how these cohorts select a workplace; how they wish to be managed; their technology preferences; factors spurring their exit from an organisation; their expectation on brand engagement, and others. These two cohorts are continuing to facilitate digital and organisational transformation, influencing brands, workplaces and other cohorts, empowered by accelerated digitalisation and expectations that are defining the new normal.

The influence of Gen Z continues to grow, with this cohort now the largest group globally, representing over one-third of the global population and overtaking Gen Y. Digitally native, socially progressive and unshackled by many of the preconceptions, prejudices and norms of the cohorts that preceded them, this cohort is shaping what the new normal will be. Born into the ubiquity of technology, information, and a digitalised milieu that has accelerated through the pandemic, this cohort is pushing the boundaries of the current workforce and brand operating models. In combination with Gen Y, Gen Z will continue demanding 'smarter' and more responsive and responsible workplaces and brands, acting as a key change agent facilitating the rectification in perceived digital shortcomings. Despite possessing the lowest degree of work experience, this research affirms that Gen Z and younger Gen Y have the 'loudest voice' influencing other cohorts, brands and the workplace through a 'Contagion Effect' as they demand faster and 'honest' engagement, greater transparency, mobile and chat-enabled communication, regular feedback, and enhanced Support through the use of AI, social media, smartphones and cloud, and others.

This research assesses multiple themes relevant to Gen Y and Gen Z in a post-pandemic environment by 'peeling the layers' of cohort behaviour to provide relevant insights into the influence of digitalisation on their attitudes and preferences towards work and brands. These two cohorts are not homogenous with this research segmenting each to reflect applicable influences. The characteristics of each segmented tier align with either 'average' Gen Y, Z, or Baby Boomer traits, or a combination of these. The degree to which the aligned traits are embedded is a factor of age, income, family status, employment experience, and other elements. This research reveals that despite variations observed in a number of responses by cohorts between the five countries, they are not deemed to be significant in indicating country-specific differences. Increased digitalisation is the constant, driving a state of flux across countries, with the assessed data providing the current reference point within each, moderated to a degree by some country-specific economic, social, and cultural factors in the near term, with harmonisation in behaviour and preferences likely to occur over time. The research highlights that Gen Z and younger Gen Y are the locus of digitally induced change, with a shift observed in the technology preferences of these cohorts over the decade preceding the pandemic. This includes a focus on lagging areas such as customer service and workplace Support that have become higher priorities for the cohorts during and after the pandemic.

A cogent message emerging from this research is the requirement for accelerated digital transformation by brands and organisations in order to meet Gen Y and Gen Z expectations. These include a lack of tolerance for latency in communication, a frustration with legacy solutions, the inability to expediently source information, and 'apathy' with brands that fail to provide appropriate digital engagement modes. As crisis measures from Covid-19 abate, hybrid working, work-life balance and an emphasis on well-being have become ingrained in the new normal. An end-state is unlikely to emerge but rather, a continuously evolving milieu spurred by flexible technology and changing organisational processes by more adaptable entities. The demands of Gen Y and Gen Z are contributing to this change as their requirements become codified into the domains in which they work and live. The key message for organisations and brands seeking to survive and thrive post-pandemic is clear: in the new normal, ignoring Gen Y and Gen Z is not an option.

Dr Alexander Grous Biography

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Dr Alexander Grous has been engaged at the LSE since 2005 and is currently attached to the Department of Media and Communications, ranked #1 in Europe and #3 in the world, in a combined teaching and research role here he focuses on Digitalisation, Digital Connectivity and Cohort Behaviour, Innovation, and other areas. He has previously been engaged in the LSE's Department of Management and the Centre for Economic Performance (CEP), Europe's leading applied economic research centre.

Dr Grous has delivered high-profile research on digitalisation and its impact on cohort behaviour, the workplace and brands, including the New Era in Experience report released in 2021 that assesses these changes before and during the pandemic. In addition, the Sky High Economics report trilogy is recognised as leading industry analysis on the role of connectivity and digitalisation in Air Transport globally with content that has won three international communications awards including: the B2B Campaign Award for Ogilvy-Inmarsat at the International Content Marketing Awards 2018, a SABRE 2020 PR Award beating 6,000 global entries, and the prestigious 2020 CIPR Award in PR in Transport. Other high profile reports have included The Transformative Effect of Cloud on Firm Productivity and Performance: Defining the Benefits and Impact of Cloud as a 21st Century Digital Enabler, and Modelling the Cloud Employment effects in two exemplary sectors in The United States, the United Kingdom, Germany and Italy. A number of reports have also been released on the transformative role of technology in the Enterprise, Managing Every Mile: How to deliver greater return on investment, and at a national level, The Power of Productivity, and Industrial Strategy in Practice: Innovation and Management Best Practices in the Automobile, Energy and Aerospace Clusters in Bizkaia. Research in Health Economics s also resulted in one of the most downloaded reports from the LSE, The British Cycling Economy with over 22,000 downloads while a report quantifying the socioeconomic impact of road traffic accidents globally on children remains one the most comprehensive efforts of its kind and was launched by HM Queen Letizia of Spain, the UN and UNICEF in 2020.

Dr Grous brings previous international experience to the LSE in C-suite roles in leading companies in digital, internet, e-commerce, and FMCG. He also advises government, FTSE 100 organisations and multinationals including Microsoft, Warner Brothers, Adobe, Motorola, Amadeus, Navisite, Inmarsat, BskyB, IBM, and others. His research is applied with significant industry engagement occurring to deliver insights that are topical and relevant.

Introduction to Cohort Behaviour

Generation Y and Z Segmentation

Considerable information exists on the attributes of Gen Y and Gen Z. This research does not consolidate or replicate the cadre of material depicting the behaviour and characteristics of each. A cursory review of their key characteristics is provided to assist in positioning the themes explored. At the overarching level, these cohorts represent a significant and growing group that will continue to influence workplace, brand, and social activities. Gen Z encompasses cohorts born between 1997-2012 and aged between 10-25 while Gen Y (*Millennials*) are born between 1982-1996 and aged between 26-41.[1][2] There are currently 1.8 billion Gen Y globally accounting for almost one quarter of the global population and are the largest adult cohort.[3] Around 150m Gen Y are located on the Continent and account for 20% of the cohort total.[4] Gen Z currently accounts for 26% of the global population with over 2 billion falling into this age group.[5] The focus of this research is on the impact of digitalisation on these two cohorts in both an organisational and non-work setting, with *digitalisation* defined by the EU as: "the use of data, digital technologies, and interconnections that results in new or changes to existing activities."[6] Both Gen Y and Gen Z displayed accelerating digitalisation behaviour before the pandemic but this is not uniform within each cohort due to their heterogeneous composition.[7] Table A depicts the sub-segmentation comprised of five-tiers in total, defined by the LSE research. Academic and mainstream analysis on Gen Y and Gen Z overwhelmingly adopts a uniform view of these cohorts that does not accurately reflect the characteristics inherent in sub-tiers:

Cohort Tiers	Age Range	Tier Alignment by Cohort Type	Alignment Summary
Gen Z Tier 1 Gen Z Tier 2	10-15 16-25	Gen Z	Tier 2 reflects the majority of reported Gen Z behaviour, with Tier 1 *formative* as it emerges into 16+ age, further study and the workforce
Gen Y Tier 1	26-30	Gen Z	Aligned with Gen Z attributes in the main
Gen Y Tier 2	31-35	Gen Z & Gen Y	Middle segment with mixed behaviour: some reflect core Gen Y while others align to Gen Z
Gen Y Tier 3	36-41	Gen Y & Baby Boomers	Some reflect core Gen Y while others align to Baby Boomers

Table A: Gen Y and Gen Z cohort tiers and alignment with the influencing cohort

Gen Z, Tier 2 reflects the widely reported and observed 'typical' Gen Z characteristics. Tier 1 represents younger Gen Z and reflects marked contrasts that delineate it from the older Tier 2 segment. This is evolving however with Gen Z Tier 1 continuing to adopt many of the attributes commensurate with the older Gen Z Tier 2, with some of these spurred by the pandemic while others reflect the continued

[1] https://www.aecf.org/blog/what-are-the-core-characteristics-of-generation-z
[2] https://www.core.co.uk/blog/millennials-and-gen-z-create-a-paradigm-shift-in-the-way-we-work-and-interact
[3] https://www.weforum.org/agenda/2021/11/millennials-world-regional-breakdown/
[4] Ibid.
[5] https://www.weforum.org/agenda/2019/02/meet-generation-z-the-newest-member-to-the-workforce/
[6] https://www.europarl.europa.eu/RegData/etudes/BRIE/2019/633171/EPRS_BRI(2019)633171_EN.pdf
[7] Reisenwitz, T., and Lyer, R. (2007). A Comparison of Younger and Older Baby Boomers: Investigating the Viability of Cohort Segmentation. Journal of Consumer Marketing. V(24) 4; pp: 202-213. https://doi.org/10.1108/073637607107559

diffusion of attributes an ever-younger group.[89] In contrast, Gen Y is characterised by three tiers, with Tier 1 congruent with Gen Z Tier 2 in the main, while middle Tier 2 Gen Y represents a mix of 'core' Gen Y attributes often reported as being characteristic of Gen Y, and Tier 2 Gen Z attributes. Tier 3 Gen Y represents older Millennials with some reflecting Tier 2 Gen Y, while others reflect Baby Boomer characteristics.[10] Understanding the heterogeneous nature of these cohorts and the sub-tier characteristics is critical when addressing workplace and brand strategies to target the varied composition of both Gen Y and Gen Z traits within each cohort, the impact of digitalisation on them and increasingly, their impact on shaping the nature, pace and depth of technological change.

Technology: Facilitating Change

Gen Z is a digitally native cohort. This group was 'born into smartphones', streaming, and the ubiquity of information access.[11] The cohort was provided with smartphones by its parents at a younger age than Gen Y: the oldest Gen Z were aged 10 at the time when the first commercial smartphone was introduced in 2007.[12] Gen Z mobile handset penetration often exceeds 100%, marginally greater than Gen Y, but over one-third of both cohorts utilise their handsets as the sole mode of broadband connectivity.[13] Gen Z primarily utilises handsets and online time for social media and entertainment while many Gen Y reflect Baby Boomer preferences for task-oriented online activities, followed by entertainment and social media.[14] Gen Z spends the highest amount of time of the cohorts on their smartphones with half spending nine hours a day on this mode, and half spending 3-8 hours a day using their smartphone.[15] Gen Z is also connected to the Internet almost all waking hours in some capacity.[16] Within the Gen Z segments, Tier 1 engages in the most social media activity of any cohort.[17] Gen Z continues to be a significant and visible digitalisation change agent, with traditional online access modes 'narrow' via a smartphone. [18] A preference exists for the accelerated adoption of Internet including the use of AI, predictive technology, virtual and augmented reality, and the Internet

[8] LSE productivity and technology research and interviews with UK enterprise managers: 2016-2022. http://eprints.lse.ac.uk/69181/1/Grous_The%20power%20of%20productivity_report-LSE_2016.pdf

[9] Grous, A. (2021). New Era in Experience Report. London School of Economics. https://www.lse.ac.uk/business/consulting/reports/new-era-in-experience

[10] Ibid.

[11] Navisite. (2018). Confident Collaboration in the Cloud. White paper. https://evessio.s3.amazonaws.com/customer/8c4659ee-526a- 4e9c-89dc-f6f4c3c1a789/event/9003422d-6d7c-4754-92f3-a95c386f392d/media/media/fffeef11-profile_Navisite_Collaborative_Cloud_Research_Paper.pdf; and: Grous, A. (2019). The Transformative Effect of Cloud on Firm Productivity and Performance: Defining the Benefits and Impact of Cloud as a 21st Century Digital Enabler. LSE Report. https://pages.awscloud.com/rs/112-TZM-766/images/The%20Transformative%20Effect%20of%20Cloud%20on%20Firm%20Productivity%20and%20Performance_Final_Report%20%28002%29.pdf

[12] https://sciencenode.org/feature/How%20did%20smartphones%20evolve.php

[13] D Ramos Méndez, F Ortega-Mohedano (2017): "The revolution in Millennial's usage habits and consumption of video in smartphones, the revealed crossroads". Revista Latina de Comunicación Social, 72, pp. 704-718. DOI: 10.4185/RLCS-2017-1187

[14] Boltan, R., Parasuraman, A., Hoefnagels, A., Migchels N. (2013) Understanding Generation Y and their use of social media: a review and research agenda. Journal of Service Management. V(24)3: pp: 245–67. https://doi.org/10.1108/09564231311326987

[15] Ahmed, N. (2019) Generation Z's Smartphone and Social Media Usage: A Survey. Journalism and Mass Communication. DOI: 10.17265/2160-6579/2019.03.001

[16] Ibid.

[17] Ibid.

[18] Ahmed, N. (2019). Generation Z's Smartphone and Social Media Usage: A Survey. Journalism and Mass Communication. V(9)3; pp: 101–122. https://doi.org/10.17265/2160- 6579/2019.03.001

of Things (IoT).[19] Gen Y displays similar trends but with lower total hours spent using their phone on average, with this reducing for Tier 3 Gen Y, with this results reflecting some Baby Boomer attributes and congruent with the behaviour of this cohort.[20] Technology continues to influence both of these cohorts and their perspectives on brand engagement and the workplace. This research has defined the term *Contagion Effect* to denote the impact that Gen Z and some Gen Y have on other cohorts, their workplace and brands as they are both affected by, and in turn effect, the rate of digitalisation and its impact. The pandemic has spurred an awareness and use of digital tools, with a shift observed by some consumers and employees from single mode digitalisation to multi-mode, in addition to spurring knowledge acquisition through digital tools and apps.[21] The Contagion Effect has also resulted in requirements previously nested amongst Gen Z filtering to other cohorts and impacting brands and workplaces: the speed of decision making by consumers purchasing goods and services online has shortened, as have their expectations for response times for queries and Support in their organisations.[22] The research indicates that in the new normal, many brands and organisations can no longer utilise mechanisms, processes and in some cases, prices, that have been in situ before the pandemic and that consumers do not believe confer a benefit and can result in a switching of purchases, loyalty and workplaces.[23]

This research affirms that through the Contagion Effect, digitally native Gen Z influences other cohorts, workplaces, and brands, resulting in an increasing digitally enabled milieu. In the workplace, this is observed through non-digitally native employees utilising new and 'smarter' technology adopted by organisations influenced by young cohorts.[24] The benefits of accelerated digitalisation are widely reported: "Expected work design characteristics have an important influence on the employees' attitude towards digital workplace transformation…Enabling employees to expect being autonomous, competent and connected at the workplace is not only vital for their expected future work performance, but also for their expected well-being in the workplace. Both of the latter in turn increase employees' positive attitudes towards digital workplace transformation and consequently their intentions to actively support the necessary change process."[25] COVID-19 has altered the work-life balance paradigm, with this research highlighting that work flexibility has become one of the most significant factors affecting both the selection of an employer and the retention of employees thereafter when combined with mental-health and well-being requirements. These are observable step-changes that were occurring to a degree before the pandemic but are now at the fore of cohort requirements and reflect both Gen Y and Gen Z sub-tier attributes and the influence of broader economic, social and other factors.

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[19] Ibid.

[20] Dabija, D. C., Bejan, B. M., & Tipi, N. (2018). Generation X versus millennials communication behaviour on social media when purchasing food versus tourist services. E a M: Ekonomie a Management. V21(1); pp: 191–205. https://doi.org/10.15240/tul/001/2018-1-013

[21] Gu, S., Slusarczyk, B., Hajizada, S., Kovalyova, I., Sakhbieva, A. (2021). Impact of the COVID-19 Pandemic on Online Consumer Purchasing Behavior. Journal of Theoretical and Applied Electronic Commerce Research. V(16); pp: 2263–2281. https://www.mdpi.com/0718-1876/16/6/125/pdf

[22] Ibid.

[23] Slusarczyk, B., Nathan, R.J.,Pypłacz, P. (2021). Employee Preparedness for industry 4.0 in logistic sector: A cross-national study between ´ Poland and Malaysia. Social Sciences. V(10)7; pp: 258. https://doi.org/10.3390/socsci10070258

[24] Soni, R. (2020). Trust in Chatbots: Investigating key factors influencing the adoption of Chatbots by Generation Z. Mukht Shabd Journal. V(IX)V; pp:5528-5543. DOI:10.18231/2454-9150.2018.1343

[25] Meske, C., and Junglas, I. (2020). Investigating the Elicitation of Employees' Support Towards Digital Workplace Transformation. Behaviour and Information Technology. Published online; pp: 1-17. https://doi.org/10.1080/0144929X.2020.1742382

Cohort Attributes

Considerable research exists that depict the characteristics of Gen Y and Gen Z. An overview is provided of key attributes for each cohort to provide additional context in which the research can be positioned, with this not exhaustive. As the younger of the reviewed cohorts, Gen Z reflects a number of characteristics:[26][27][28]

- Multi-tasking, impatient, independent, without reservation in wanting to be heard including for personal and social causes.
- Mental health and well-being concerns both in the workplace and outside of it.
- Values work flexibility and independence in the assignment of tasks, but dislike micromanagement.
- Financially focused, concerned with stability but shows a willingness to change jobs quickly if values and expectations are not met.
- Values individual expression and creativity, with a disregard for 'labels'.
- Accepting and tolerant, with diversity and inclusion 'second nature' and ingrained.
- Digitally native, technology-centric, questioning technology status-quo.
- Pursues parallel career paths including a primary job while also developing other entrepreneurial opportunities.
- Values personal relationships and creates a network of 'trust' including for brand purchases via influencers, with short decision-making for most work and life-aspects.
- Seeks feedback and values mentoring, but also expects rapid career advancement.

Gen Y shares some of these characteristics, particularly younger Tier 1 Gen Y. The key traits observed with Gen Y include: [29][30][31]

- Values relationships including hierarchical ones in the workplace, with lower propensity to make quicker career decisions based on impulse than Gen Z.
- Technology adaptive with rapid ability to take-up technology, software, and solutions
- Open and receptive to change.
- Problem solving with teamwork skills and collaborative engagement.
- Socially conscious and a lack of tolerance for injustice and discrimination.
- Flexible and adaptive with some entrepreneurial characteristics.
- Transparent and pragmatic and willing to discuss personal issues.
- Value flexible work and mental health and well-being.
- Financially conscious and frugal, and pride on being a 'reliable worker'.
- Longer decision-making timeline than Gen Z, relying on wider feedback, reviews for brands, and self-directed research.

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[26] Kapil, Y., and Roy, A. (2014). A Critical Evaluation of Generation Z at Workplaces. International Journal of Relevance and Concern. V(2)2; pp: 10-14. ISSN No 2347-9698.

[27] Dolot, A. (2018). The characteristics of Gen Z. e-Mentor. V(2)74. https://doi.org/10.15219/em74.1351

[28] Ensari, M. (2017). A study on the differences of entrepreneurship potential among generations. Research Journal of Business and Management. V(4)1; pp:52-62. DOI: 10.17261.

[29] Acar A. B. (2014). Do Intrinsic and Extrinsic Motivation Factors Differ for Generation X and Generation Y? International Journal of Business and Social Science. V(5)5; pp. 12-20. http://ijbssnet.com/journals/Vol_5_No_5_April_2014/3.pdf

[30] Twenge J. M. (2010). A Review of the Empirical Evidence on Generational Differences in Work Attitudes. Journal of Business and Psychology. V(25); pp. 201–210. http://dx.doi.org/10.1007/s10869-010-9165-6

[31] Robnett, R., Meuser, T., Cheng, S., Thai, D., Tuladhar, D., Poulin, M. (2021). Exploring Cross Generational COVID-19 Attitudes and Behaviors. Advances in Aging Research. V(10)5. DOI: 10.4236/aar.2021.105007

Both Gen Y and Gen Z display alignment in their support of social causes, diversity, flexible working practices, mental health and well-being, finances, technology use. Variations exist on the degree to which this is observed between the two cohorts reflecting the influences specific to each. Post-pandemic, the structural shifts in work-life balance will continue to interplay with changing social attitudes including on sustainability, diversity and inclusion, and shape both workplace and brand activities, with Gen Y and Gen Z at the forefront of enabling change. When organisations harness the 'power of the cohorts' to effect organisational and technological changes, the benefits can both numerous and tangible.

Tangible Benefits

As digital transformation continues unabated, the adoption of lower-cost cloud-based solutions in conjunction with mobile apps and a hybrid, flexible workforce is overhauling how both large and small organisations operate.[32] These elements also affect how product development, innovation and competitive capability occur: organisations that utilise cloud for innovation are more innovative and productive, with 90% of enterprise customers adopting cloud to drive productivity improvements compared to 55% in 2013.[33] In addition, 66% of firm managers believe that their primary competition is from digitally enabled cloud start-ups often founded and managed by Gen Z and Gen Y.[34] These cohorts represent an opportunity for incumbent firms to integrate digitally native (Gen Z) and technology-savvy (Gen Y) skills and topical outlooks into their operations and compete with these smaller cloud enabled, low-overhead firms. The benefits of incorporating Gen Y and Gen Z with a digitalised workplace are many: a high degree of agility, rapid innovation cycles, and entrepreneurial risk-taking and experimentation that reflect the core attributes of Gen Z.[35] Process innovation complements this capability as forward-thinking firms integrate the use of social media to gather information rapidly, interact with customers and launch new product versions faster than previously occurred. [36] Gen Z and Gen Y can enhance these channels through their digital experience and immersion with social media and related activities.

The pandemic accelerated changes already underway and created a paradigm shift that Gen Y and Gen Z are ensuring remains the basis for the new normal. These cohorts are demanding the expanded use of digital workplace technologies encompassing internal social media, instant messaging, collaborative applications, and others, that can lead to enhanced employee engagement levels and greater productivity.[37] The benefits are tangible: employees who have a greater degree of motivation and job satisfaction perform 16% better than other employees. Further, a digital workplace can lead to a 70% increase in worker productivity and a 53% increase in employee engagement.[38] These

[32] Gbadegeshin, S. A. (2019). The effect of digitalization on the commercialization process of high-technology companies in the life sciences industry. Technology Innovation Management Review. V(9)1; pp: 49-63. https://doi.org/10.22215/timreview/1211

[33] Grous, A. (2019). The Transformative Effect of Cloud on Firm Productivity and Performance: Defining the benefits and impact of cloud as a 21st Century digital enabler. London School of Economics and Political Science. https://www.lse.ac.uk/business/consulting/reports/the-transformative-effect-of-cloud-on-firm-productivity-and-performance

[34] Ibid.

[35] Ibid.

[36] Fichman, R. G., Santos, B. L., Zheng, Z. (2014). Digital innovation as a fundamental and powerful concept in the information systems curriculum. MIS Quarterly. V(38)2;, pp: 329–353. DOI:10.25300/MISQ/2014/38.2.01

[37] Haddid, A., et al (2018). Op cit.

[38] Ibid.

factors can directly translate to an increase in total factor productivity (TFP) at the organisational level when technology is utilised in conjunction with best practices management:[39] when the intensity of technology adoption (encompassing digital and non-digital assets) is high but the quality of management practices is low, a 2% increase in TFP can be achieved. When the intensity of technology deployment is low but the quality of management practices is high, an 8% increase in TFP can be achieved. When a high degree of technology deployment occurs in combination with high quality management practices, an increase of 20% in TFP can be achieved.[40] The benefits can filter to multiple operational areas including reducing the average time to market by 90%[41] and increasing development productivity by a factor of five compared to pre-cloud.[42] The catalysts for post pandemic digitalisation success and competitive advantage are not one-dimensional: the combination of progressive management and work practices, Gen Y and Gen Z recruitment and development and the adoption of nimble, lower-cost cloud solutions represent a tripartite model for success. For many organisations, this is an unattainable step-change due primarily to managerial short-sightedness and the inability to adjust their status quo.[43] In contrast, those organisations that are created with a 'digital DNA', including by Gen Y and Gen Z founders, and those willing to transform their operations to meet the accelerating digital ubiquity in a post pandemic world, the rewards can be significant.

Research Methodology

Ongoing Research

This study draws on the considerable primary research undertaken since 2010 by the LSE Team on digitalisation, including its impact on Gen Y and Gen Z behaviour, and management practices. This study extends this through additional primary research post-pandemic, with a sample of 200 Gen Y and Gen Z cohorts interviewed from five countries: the UK, France, Germany, Sweden, and Norway. This multi-layered approach leverages previous pre and in-pandemic research activities and provides a continuous monitoring of cohort digital behaviour, digitalisation in the organisation, and consumer trends both online and offline. This research is a post-Covid-19 investigation that has both drawn on ongoing activities to define relevant areas for investigation, in addition to extending this with current perspectives from the two cohorts. The research is nested in extensive activities that precede it at a global level:

- International firm-level research spanning SMEs and multinational firms pre-pandemic and in-pandemic for both b2b and b2c with detailed interviews and case studies undertaken with C-Suite leaders assessing digitalisation, management practices and cohort activities and preferences.[44]

[39] Results from the World Management Survey, the first cross-country, cross-industry dataset built to measure the quality of management practices in establishments: LSE Management Matters productivity research from 2007-ongoing with McKinsey and Co, covering 20,000 interviews in 35 countries; the largest management and company review study in the world https://worldmanagementsurvey.org/#

[40] World Management Survey, op cit., and: Bloom, N., and Van Reenen, J. (2007). Measuring and Explaining Management Practices Across Firms and Countries The Quarterly Journal of Economics. V(122)4; pp: 1351–1408. https://doi.org/10.1162/qjec.2007.122.4.1351

[41] https://aws.amazon.com/solutions/case-studies/kenshoo/

[42] R. Perry, IDC at: https://media.amazonwebservices.com/IDC_Business_Value_of_AWS_Accelerates_Over_time.pdf

[43] LSE research: 2018-2020. Op cit; including interviews with technology providers in the UK encompassing KMPG Cloud Practice and other technology consultancy engagement (2020) that provided trends at sector, cohort and country-level

[44] Ibid.

- CIO engagement in 300 large French, German and UK enterprises to assess their technology and digitalisation strategies along with their approach to management during a crisis including exogenous shocks.[45]
- Results from the largest ongoing study of management practices by the LSE and its partners with over 20,000 interviews undertaken since 2004 in 35 countries including in-company interviews and technology assessment for a sample within this pool to define workplace ICT adoption, strategy and employee and b2b use.[46]
- Interviews and ongoing engagement with big-four digital and technology consultancies in the EU encompassing results from firms across sectors, size and regions both to gauge organisational adoption of digitalisation and other technology in multiple countries, and employee engagement.[47]
- Ongoing engagement with enterprise managers in the Retail and Finance sectors assessing digitalisation, employee trends and cohort behaviour: 2019 onwards.[48]
- Deep sector-specific and Gen Y and Gen Z behaviour analysis and predictive modelling to establish 10-year trends including technology adoption, leisure, and behaviour by regions.[49]
- Interviews with 26 CEOs, CIOs and Director-Level leaders of major global enterprises to assess digitalisation, employee and cohort work and leisure trends and other attributes for over 0.5m employees across continents.[50]

Additional secondary activities complement these major streams, drawing on other academic research relevant to the themes explored.

New Primary Research and Methodology

This study extends the LSE Team's ongoing research in digitalisation, cohort behaviour and technology both within the workforce and for non-work activities, through the exploration topical queries. These frame the research questions and define the approach and target segments assessed:

- *Target recipients:* Gen Z and Gen Y.
- *Themes*: Influencing factors on their behaviours encompassing:
    - Social, economic, and other factors.
    - Technology adoption, use and trends.
- *Environments*: Work and non-work environments (brand engagement).

These define the research objectives and approach undertaken, depicted in Table B:

[45] LSE research: 300 CIO interviews June-July 2009 and after encompassing 100 interviews per country: UK, France and Germany with EUR2bn average revenue/firm. Reported in: https://www.ft.com/content/ae66e69e-e4c3-11de-96a2-00144feab49a, enhanced by additional research January 2019-December 2020 with 20+ CxOs in EU firms and technology providers to enterprise customers covering over 400,000 employees internationally.

[46] https://worldmanagementsurvey.org/policy-and-business/for-governments/other-researchers-work/

[47] LSE productivity and technology research and interviews with UK enterprise managers: 2016-2022. http://eprints.lse.ac.uk/69181/1/Grous_The%20power%20of%20productivity_report-LSE_2016.pdf

[48] LSE Management Matters Interviews. (2010-ongoing). Over 20,000 interviews have been conducted with firm managers to date in 35 countries assessing productivity and technology; and: http://eprints.lse.ac.uk/69181/1/Grous_The%20power%20of%20productivity_report-LSE_2016.pdf

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[50] Grous, A. (2017). Managing Every Mile. https://3rxg9qea18zhtl6s2u8jammft-wpengine.netdna-ssl.com/wp-content/uploads/2017/09/LSE_Managing-every-mile.pdf

Research Approach and Interview Strategy	
Objective:	Explore the expectations of younger generations (Y and Z) toward their workplace, as consumers and socially and the role that technology and digitalisation play.
Sample size:	200 segmented equally between Gen Y and Z from five countries: UK, France, Germany, Netherlands, Sweden.
Target cohorts:	Millennials (1981-1996; 26-41) and Gen Z (1997-2012; 10-25 segmented for 18-25 year olds) with a number of Gen Z reflecting a mix of employment without further study, studying (secondary + post-secondary) and graduates working, seeking work, travelling, undertaking other leisure activities, with some Gen Y also reflecting this profile.
Approach:	22 directional questions to provide expedient quantifiable metrics. Free text has not been utilised due to the complexities in consolidating and assessing these responses and within a defined period of time.
Categories:	The questions were segmented between two categories: (i) workplace and (ii) social/non-workplace interaction. Their definition draws both on considerable LSE primary research to date research rom academic journals and other sources to define the appropriate queries to be explored. Some additional pre-testing occurred with a small pool of 10 respondents before the final set of questions were defined.

Table B: Research approach and interview strategy

The cohorts and age range for the study encompasses Gen Y and Gen Z aged between 18-41. A sample size of 200 in total has been utilised. This sample size is deemed sufficient to provide results representative of the population, while balancing time, budget and logistical considerations. Face to face interviews were conducted at multiple London boroughs, Brighton and Hove, and Central Manchester by the LSE team wearing lanyards to identify themselves by approaching the public at random including in busy locations such as shopping precincts, central work areas, selected ethnically diverse locations, academic institutions, and other areas and by contacting known individuals. Initial testing revealed that there was a need to assist responders with elaboration for many questions and to facilitate forced ranking that negated the use of a purely online survey approach. The locations generated the required sample that included UK and non-UK nationals from the included countries in the study. The sample was segmented evenly between Gen Y and Gen Z.

Research Questions

Twenty-four questions were defined to explore the research themes, segmented between two anchor areas of activity: 'Workplace' and 'Non-Workplace-Brand Engagement'. Twelve workplace-related questions explored how the cohorts viewed work and how they engaged both with a working environment and technology as it relates this milieu. An additional 12 questions explored a non-work setting and how the cohorts engaged with brands including the use technology. Two questions within these explored the role of Support both from brands and in the workplace with this recognised as a key emerging requirement. Response options were defined that are believed to represent key Gen Y and Gen Z post-Covid-19 factors of relevance and concern encompassing digitalisation and other areas. These were defined based on results obtained from the considerable ongoing LSE research undertaken before and during the pandemic. Free-text was discounted after initial testing resulted in a cadre of responses that hindered the exploration of known themes, concomitant to the time-commitment required to interpret such data. The final approach utilised encompassed:

1. One question in the sample required recipients to force rank three responses from the options provided, ranging from their highest ranked selection and followed by a second and third ranked selection (Question 1).
2. The remaining questions were comprised of a pre-defined number of factors from which responders were asked to select a single response that reflected their most significant factor.

The questions and response selections are depicted below. These are segmented between Workplace and Non-Workplace: Brand Engagement:

(A) Workplace

1 *What are your most important factors when selecting whether to work at an organisation? (rank your selection from 1-3 with 1 representing your first choice followed by your second and third choice):*

- Salary
- Flexibility (including remote, hybrid, hours worked)
- Personal satisfaction/meaningful work
- Rapid progression, fast feedback
- Skill development, mentoring with the opportunity to grow and learn
- Job security
- Work-life balance and well-being
- Parenthood flexibility
- Pet flexibility
- Volunteering
- Culture/DEIB (diversity, equity, inclusion, and belonging)
- ESG (strong environmental, social, and corporate governance)
- Technology use

2 *What is the primary reason you would leave/have left a job?*

- Culture, and/or DEIB or ESG
- Lack of flexibility
- Bad manager including blocking, 'doesn't get you', unapproachable, won't listen
- Lack of engagement by the organisation
- Boredom
- Lack of career advancement
- Lack of work-life balance
- Travel
- Burnout

3 *What do you believe is the worst management practice in an organisation/where you have worked?*

- Lack of work flexibility, strict hours
- Lack of ongoing feedback, communication & training
- 'Old school'/outdated technology
- 'Helicopter management'/lack of responsibility
- No regard for well-being and mental health
- Poor values and social-cause activities

4 *What working mode do you prefer?*

- Working in a team
- A mix of team and independent
- Primarily independent

5 *What are your preferred communication modes with your work organisation?*

- Digital (email, WhatsApp, IM, text etc)
- Face to face

- Telephone
- Video (e.g. Teams, Zoom, etc)

6 *What makes the ideal technology work environment?*
- Use own smartphone
- Use a laptop and/or home connectivity/work anywhere
- Use IM and social media for work
- Collaborative apps such as Slack, Workplace, etc

7 *How can organisations optimise internal employee engagement?*
- Offer more self-service online
- Provide Chabot's and AI for relevant queries
- Push-responses to smartphones via apps, email and texts
- Offer short response times
- Deliver the lowest touchpoints for online engagement
- Collaborative content and sharing

8 *What experiences can you highlight in your personal lives which you would like to see your work adopt?*
- Openness in communication
- Respect from others
- Faster communication
- Greater use of smartphones and IM
- Continued hybrid/flexible working
- Smarter support, more self-serve

9 *What do you think will be the next big trend in technology and how will companies adopt it to engage customers and employees?*
- More f2f video
- Omni channel use for support
- Good, smart self service
- Real time messaging vs email
- Personalised content via predictive/AI
- Social media for customer service
- Augmented reality for customer service

10 *If you could identify only one technology element your organisation could improve/should have, what would it be?*
- More cloud adoption and cloud tools
- Cloud based collaboration
- Increasing automation
- Digital in-house engagement
- Greater IoT devices
- Workflow tools
- Virtual onboarding, HR, queries
- Bots, AI and self service

(B) Non-Workplace: Brand Engagement

11 What is the primary way that you interact with a brand?

Use social media for queries

- Follow the brand on social media
- Use social media to search for other/new brands
- Online searching
- Online chat
- Send an email
- Call

12 What factors help to convert your interest with a brand to a purchase?

Word of mouth

- Customer reviews
- Online ads
- Influencer or someone followed
- Endorsements

13 Do you prefer visual content or text content when engaging with a brand?

- Visual
- Written
- A mix

14 Do you permit cookies to optimise your web experience?

- Reject all cookies
- Accept some cookies- self selected
- Accept all cookies

15 What is your primary purchase technology mode?

- Smartphone
- Online via computer/tablet
- Telephone

16 What frustrates you when interacting with a brand's website?

- *Too much text* & lack of visual content
- Hard to find information
- Uninteresting content and offers
- Lack of customised content
- Slow website
- Lack of instant contact options
- Not optimised for *mobiles*

17 Which contact mode is your preferred one for brand engagement?

- Live chat
- WhatsApp
- Social Media including DM
- Email
- Phone
- Contact forms

18 How important is video and interactive content in brand engagement?

- Extremely important
- Very important
- Important
- Not important

19 When engaging with a brand what is the most important attribute that you look for?

- Trust and authenticity
- Quality
- Personalisation
- Values and social responsibility
- Diversity and inclusion

20 What is the most important to you when seeking assistance from a brand?

- Immediate resolution: BOT and/or live
- Self-service: with or without live
- Personalised response: immediate or lagged
- First-time resolution for any issue

21 What is a major turn-off when engaging with a brand?

- High prices
- 'Poor' values
- Lack of transparency & authenticity
- Lack of immediate contact/service options
- Poor engagement experience
- Lack of short, quick content

22 If a brand could do one thing to engage with you better, what would it be?

- Honesty and relevance
- Low cost & high quality
- Ethical, socially & environmentally responsible
- Optimised, fast website and social media presence
- Fast instant engagement options
- Drop 'pretend coolness'

Additional Query: Support – What work-related support factors create a negative experience?

- No instant/2-way messaging
- Long response times
- Email/contact forms only
- No phone number
- Outdated/static intranet

Additional Query: Support – What is the most important organisational support attribute?

- Chatbot diverting to live chat escalation
- Lowest touch points possible
- Live chat
- Instant/short response times
- Ability to contact key areas

The responses to these questions were assessed across the five countries to provide insight into how Gen Y and Gen Z behaved with both the workplace and in their engagement with brands.

Analysis and Trends: Emerging Factors

Key Findings Summary

Results from the interview questions are congruent with the observations collated to date from LSE and other research on cohort behaviour both in and out of the workforce. Many of the trends emerging before the pandemic accelerated during Covid-19 due to the onset of the pandemic, with digitalisation acting as a catalyst spurring considerable step-change for the new normal. This research provides a topical insight into the behaviour of younger cohorts as they are affected by digitalisation and in turn affect technological change, workplace alignment, and how brands engage with their followers. This section provides a summary of key observations by cohort. The results indicate that despite some variations observed in the responses between countries, at an overarching level, these are not deemed to be significant. Behaviour and preferences were relatively consistent between the five countries with Norwegian and Swedish cohorts at times displaying some divergence in results to the UK, France, and Germany, with cultural factors potentially influencing this. This is not believed to be material with the flux observed likely to harmonise in time across the countries with the results providing a Pan-European perspective in both a workplace and brand engagement setting and observed variations reflecting cultural country-specific influences.

The first environment assessed was *the workplace*. Both Gen Y and Gen Z indicated that the key factors they considered when selecting an organisation to work for were *flexibility*, with *work life balance* placed marginally behind this as a second consideration. Salary was not the primary workplace selection factor, congruent with other findings that highlight the role these two elements play during and post the pandemic as motivation for workplace selection and the changing influence over time of salary as a primary factor.[51] The primary influences in exiting an organisation varied between the cohorts. Gen Z cited *Lack of Career Advancement* as the primary factor but only by 1% above *Lack of Engagement by the Organisation.* The latter was selected by Gen Y as the primary departure factor, marginally above *A Bad Manager*. Both cohorts ranked *Work-Life Balance* in the middle tier of responses. Almost one-third of both cohorts cited *Helicopter Management* as a negative organisational management practice but variations were observed between Gen Y and Gen Z response regarding their lower-ranked selections: Gen Z displayed a three-fold higher ranking of *Poor Values* and a *Lack of Social Cause Activities* than Gen Y. The latter however showed a two-fold greater preference for working in a team, while Gen Z depicted a two-fold preference for independent work than Gen Y. Both cohorts depicted a similar preference for working in a combined teamwork and independent mode, with the variations evident in their preference for one or the other of these modes. When reviewing communication modes for work, Gen Z rated digital modes including *WhatsApp IM,* and some *email* use as the highest factors, while Gen Y depicted a more balanced distribution of responses across these modes, *Video* and *Face to Face* communication modes. When selecting their ideal technology modes for work however, both selected *Laptop* as their preference,

[51] Grous, A. (2017) Sky High Economics - Chapter One, op cit, Grous, A. (2019) Sky High Economics Chapter Three, op cit.; LSE research: 2018-2020. Op cit, including interviews with technology providers in the UK encompassing KMPG Cloud Practice (2020) that provided trends at sector, cohort and country-level trends, and Grous, A. (2021), op cit.

with Gen Z selecting smartphones and IM as equal second factors, with smartphones selected by twice as many as Gen Y. Significant variations were evident when the optimised mode of internal employee engagement were selected, with Gen Z ranking *Chatbots and AI,* and *Self-Service* equally as primary preferences with Gen Y preferring *Chatbots and AI* followed by *The Lowest Number of Touch Points*, with reflecting a desire to select options with as few clicks as possible.

Both cohorts ranked *Faster Communication* as their highest externally transferred expectation into a work environment. This was followed by the use of *Smarter Support & Self-Service*. The highest ranked preference for workplace adoption amongst technology trends was divided equally for Gen Z between *Omni Channels for Support* and *Real-Time Messaging (vs email)*. In contrast, Gen Y selected *Good Smart Self-Service* followed marginally by 2% by *Omni Channels for Support.* The responses reflect the emergence of *Support* related themes as high priorities and with greater prominence than in mid 2010.[52] When considering what additional technology improvements that can enhance the workplace, Gen Y and Gen Z provided differing preferences: almost one-quarter of Gen Z selected *Bots, AI and Self-Service* followed only by 2% for *Increased Automation.* Gen Y selected three first-place factors almost equally: *Increased Automation*, *Greater IoT Devices*, and *Greater Cloud Adoption.*

The second assessed environment was *brand engagement.* Gen Z selected *Follow the Brand on Social Media* as the preferred primary engagement mode with 40% of this cohort aligned to this option. Gen Y also selected this as the primary engagement factor but with a 50% lower preference rate to Gen Z. In the same category, Gen Z maintained its preference for social media, selecting *The Use of Social Media for Queries* as the second highest ranked factor, with a response preference three times higher than Gen Y, where this was ranked equally last by Gen Y. Gen Z displayed its lack of preference for *The Use of Email* and *Call* as technology engagement modes, with a zero-response received for these, in contrast to a 14% and 9% response respectively of Gen Y. When assessing their purchases from brands, the primary factor facilitating conversion for Gen Z was through an *Influencer,* with 42% selecting this mode; two and half times higher than Gen Y. The latter cohort provided an almost equally high selection score for its primary purchase conversion mode, but for *Customer Reviews* (44%). Similar variations in scores were observed in the selection of visual or text information when engaging with a brand. Gen Z ranked *Visual* as the highest (41%) while Gen Y selected *Written* as its highest preference, by a narrow 2% margin over another factor, A *Mix of Visual and Text* (40%, 38% respectively). Both Gen Y and Z overwhelmingly ranked the use of their smartphone as the primary brand purchase mode (60%). Gen Z cited *No Optimised for Mobiles* as the highest ranked frustration when engaging with a brand, followed marginally by *Too Much Text & A Lack of Visual Content.* Gen Y reversed these two responses, citing the latter as its highest ranked frustration followed by the lack of mobile optimisation.

Gen Z cited *Social Media and DM* as their preferred brand engagement mode followed marginally by *WhatsApp*. In contrast, Gen Y prefers *Live Chat* followed marginally by *Social Media and DM*. The use of video and interactive content resulted in around two-thirds of Gen Z selecting this mode for the highest preference of *Extremely Important*, while Gen Y highlighted this as equally important with *Very Important.* The most important brand engagement attribute for both Gen Y and Gen Z was *Trust and Authenticity*, followed by *Personalisation*. When seeking assistance from a brand, Gen Z cited *Immediate Resolution: BOT and/or Live*, while Gen Y selected this as the second highest factor, behind

[52] Ibid.

its highest ranked factor of *Self-Service: With or Without Chat.* The highest ranked negative factor for brand engagement for Gen Z was *High Prices,* with 60% citing this factor, while Gen Y selected *Poor Engagement Experience.* Both Gen Y and Gen Z cited *Low Cost & High Quality* as the most important factor that brands could improve. A significant variation was observed in the second highest ranked factor, *Honesty and Relevance* with Gen Y providing a response four times higher than Gen Z (24% versus 6%), with Gen Z also ranking this as its lowest factor. The final two areas explored Support, with Gen Z selecting *No Instant/2-Way Messaging* as its primary frustration, in contrast to Gen Y selecting *Long Response Times* as its primary frustration. Each cohort also selected these as their second highest frustration in reverse order. The final area explored what the cohorts deemed to be the most significant attribute for *Support* in the workplace. A marked divergence was observed in responses, with Gen Z selecting *Chatbot & Live Chat Escalation* as its primary preference (38%) in contrast to only 5% of Gen Y selecting this factor. Further, Gen Y ranked this factors as its lowest preference, selecting *Live Chat* as the most important factor (33%) and *Lowest Touchpoints*[53] as its second highest factor. Gen Z selected the latter as its third highest requirement, behind *Instant/Short Response Times.* Pre-pandemic, Gen Z did not reference this factor, while Gen Y provided intermittent reference to it. The emergence of *Support* as a key organisational demand represents a paradigm shift by both cohorts. These observations are depicted in greater detail in Table C. This precedes the subsequent sections of the report that provide a granular level of analysis underpinning the results:

	Theme/Question	Gen Z Key Observations/Applicable for Both	Gen Y Key Observations/Applicable for Both
	Workplace		
1	Important factors when selecting an organisation to work for	• *Flexibility* followed by *Salary* equally selected with Gen Y as dominant first choice factors. • *Flexibility* 10% higher than Gen Y overall with German, Swiss and French Gen Z twice as high preference than UK and Norway Gen Z. • *Culture* significantly higher preference than Gen Y. • *Work Life Balance & Wellbeing* featured strongly for both Gen Y & Z for 2nd/3rd choices • *Technology* not significant for Gen Y & Z	• *Personal Satisfaction* and *Culture* 5% & 4% lower preference than Gen Z respectively. • Consistent preference for *Flexibility* vs Gen Z across countries • *Work Life Balance* significantly higher than Gen Z. • *ESG* significantly lower than Z. • *Rapid Career Progression* lower on average then Gen Z. • *Parental Flexibility* only selected by Gen Y
2	Primary reason to leave a job	• *Lack of Career Advancement* was the highest, and twice as high as Gen Y; *Lack of Org., Engagement* same for Gen Y and Z and highest for Gen Y, and 2nd highest for Gen Z, along with *Travel*; *Bad Manager* higher than Gen Y; *Boredom* twice as high as Gen Y. • Norwegian Gen Z only country to select 4 factors: *Culture, Lack of Flexibility, Bad Manager, Lack of Engagement.*	• *Burnout* only selected by Gen Y. • *Lack of work-life balance* selected in mid-ranking by both Gen Y and Z. • *Culture* similar across Gen Y, vs low for UK, France, and Germany and very high for Norway and Sweden. • *Travel* selected by Gen Y & Z but UK & Norway Gen Y highest of all sample (25%+) • Variation in factors across all countries.
3	Worst organisational management practices	• *Helicopter Management* equally first (28%) for Gen Y and Z; dominant in UK, France, Germany for Gen Z as highest vs *Lack of Work Flexibility & Ongoing Feedback* in other countries. • *Poor Values* 3x higher for Gen Z.	• *No Regard/Well-Being* 2x higher than Gen Z. • *Lack of Ongoing Feedback* 7% higher than Gen Z.
4	Working mode preference	• Both Gen and Y selected a mixed team/ independent work mode as first choice. • Over twice as many Gens Z selected 'independent' as 3rd choice than Gen Y.	• Over twice as many Gen Y selected 'teamwork' as 2nd choice • France was the lowest ranked Gen Y for 'independent' Gen Y (5%)

[53] 'Lowest Touch Points' reflects the least number of actions and activities that are required for engagement. For Support, cohorts express negative sentiment with solutions and apps that require multiple selections and 'clicks' that often do not resolve their queries and result in further frustrations. Examples cited include IVR systems and limited online options.

		• UK, France and Germany Gen Z showed 2x preference for teamwork than other countries.	
5	Preferred communication modes with the organisation	• *Digital (WhatsApp, email+)* dominant for Gen Z followed by *Video,* while *Face to Face* and *Digital* equally ranked as top by Gen Y. • Gen Y and Z Nordic did not select *Telephone.*	• *Telephone* 2x higher than Gen Z overall • *Video* showed high variability for both Gen Y & Z across countries.
6	Ideal technology work environment	• *Laptop/Connectivity* rated highest for Gen Y & Z followed equally by *Smartphone* and *IM* for Gen Z. • *Smartphone* 2x higher than Gen Y.	• *Collaborative Tools* higher than Gen Y. • *IM* higher than Gen Z. • *Smartphone* not selected by Nordic Gen Y, but strongest *Collaborative App* preference.
7	Optimise internal employee engagement	• *Self-service, Chatbots/AI* highest for Gen Y & Z. • *Self-service* 11% higher for Gen Z; *Push-responses to phone* 6% higher. • *Collaborative Content, Lowest Touch Points:* 0 response from Gen Z except for UK, Norway.	• *Lowest Touch Points* almost 3x greater, and *Collaborative Content* 5x greater than Gen Z. • Norway and France had zero *Collaborative* response. • Norway had zero *Self-Service* response
8	Work adoption of personal preferences	• *Faster Communication* highest for Gen Z and Y • UK Gen Z lowest for *Openness* and *Respect* • *Sweden* had highest (71%) response for *Faster Communication* and 1 other response only.	• Marginally higher Gen Y for Greater Smartphone Use and AI. • UK Gen Y had highest *Home-Working* response vs zero for Norway.
9	Technology trend and workplace adoption	• *Real Time Messaging* highest response 2x Gen Y, with *Augmented Reality* also 2x Gen Y • *Social Media* was higher than Gen Y • *Personalised Content* was low both Gen Y & Z • *Self Service* was the most variable for Gen Z.	• *Smart Self-Service* highest response marginally ahead of *Omni Channel Support,* both on average 10% higher than Gen Z. • Norway Gen Y showed lowest (zero) for *Personalisation, Social Media* and *AR.*
10	Adoption of a single organisational technology improvement	• *Bots & AI* was the highest followed by *Increasing Automation* • *Bots & AI* was 4x Gen Y. • Swedish Gen Z had highest *Increased Automation* of all responses (43%) and Norway 2nd highest (29%)	• *Increasing Automation, More Cloud Adoption, IoT Devices* were equal highest. • *Cloud Adoption*: 2x Gen Z, *Workflow Tools* 4x • Swedish Gen Y had highest *Increased Automation* of all responses (57%) and Norway 2nd highest (38%) • Only German, Norway Gen Y ranked *Bots/AI.*
	Brand		
11	Primary mode for brand interaction	• *Follow on Social Media* was the highest both for Gen Z (40%) and Gen Y (24%), with Sweden and Norway Gen Z the highest (over 50%). • Gen Z zero response for *Email* or *Call,* vs 14% and 9% respectively for Gen Y. • *Social Media* 3x higher for Gen Z (40%) and 5% higher to *Search for Brands.*	• *Live Chat* 3x higher than Gen Z. • *Follow the Brand on Social Media* showed closer alignment with Gen Z. • *Call* option positive in all countries (7-14%).
12	Factors converting brand interest to purchase	• *Influencer* was the highest response (42%) vs 20% for *Customer Reviews,* with Germany, Sweden and Norway 50-65% vs 15-25% for Gen Y. • *Endorsements* were 5% higher than Gen Y. • *Online Ads* scored zero except for UK (4%)	• *Customer Reviews* (44%) was the highest response vs 17% for *Influencer,* with 71% for *Influencer* for Sweden, 63% for Norway, 60% Germany. 1 • *Online Ads* were 5x higher than Gen Z. • *Endorsements* were zero Germany, Sweden and Norway.
13	Brand engagement: text or visual.	• *Visual* was 2x as high as Gen Y (41%) with UK, France, Sweden the highest at 47% and 50% respectively. • *A Mix* of text and visual rated the lowest of the three.	• *Written* and *A Mix* rated 8% and 10% higher than Gen Z respectively. • Every country varied in preference between al three options with *Mix* and *Written* comparable.
14	Cookie permissions	• The highest rejection of cookies (26%) vs r Gen Y (16%) • Sweden and Norway Gen Z rejection rate 2.5 x other Gen Z countries • France and Germany highest acceptance of all cookies (55-45) respectively) up to 3x others • UK highest self-selection 2.5x some countries	• Same response for self-selection between Gen Z and Y (39%) • 10% higher acceptance of all cookies. • France highest acceptance of all cookies (75%
15	Primary purchase technology mode	• Marginal variations observed between Gen Z/Y with 60%/57%, 40%/42% and 0%/1%	• Norwegian Gen Y had the highest response for *Smartphones* (75%) and the lowest for *Computer/Tablet* (25%)

		respectively selected for *Smartphones, Computer/Tablet* and *Telephone.* • Sweden and Norway had the highest responses for *Smartphone* (88-86%) and lowest for *Computer/Tablet* (13-14%) with other countries split 55%/45% for *Smartphone* and *Computer/Table* respectively.	• All Gen Y except Norway aligned with Gen Z results for *Computer/Tablet.*
16	Frustrations when interacting with a brand	• Both Gen Z and Y rated similar issues: 31% rated *Excessive Text.* • Only Norwegian respondents indicated *Hard* • *Lack of Instant Contact Options* was less of an issue in Norway and Sweden for Gen Y and Z. • *Uninteresting Content and Offers* was not perceived as a major frustration but was the fastest site departure factor for both cohorts.	• 27% rated *Non-Optimised for Mobiles* as second, vs 19% for Gen Z • Only UK respondents indicated *Hard to Find* information was a negative, vs all countries indicating it was a negative for Gen Z except for Norway (0%).
17	Preferred brand contact mode	• 90% of responses split between *Social Media* (45%) and *WhatsApp* (39%) and minority for *Live Chat* (15%) with no *Phone* or *Contact Forms* option selected. Swedish and Norwegian Gen Y aligned closer to Gen Z.	• *Live Chat* rated the highest (27%) followed by *Social Media* (23%), *WhatsApp* (21%), *Email* (16%) and *Phone* (10%). *Contact Forms* rated <10%, only by France, Germany.
18	Importance of video and interactive content	• Two-thirds selected *Extremely Important* vs half this selection by Gen Y. • *Not important* not selected.	• Equal split between *Extremely Important* and *Very Important* (36%), followed by *Important* (25). • UK and French *Extremely Important* closer alignment to Gen Z, twice as high for other Gen Y countries.
19	Most important attribute when engaging with a brand	• *Personalisation* was rated second by both cohorts with Gen Z 6% lower than Gen Y (27% vs 32%). • *Values & Social Responsibility* twice as highly ranked vs Gen Y	• *Trust & Authenticity* was highest factor for both cohorts, with Gen Y 5% higher than Gen Z (37% vs32%). • *Diversity & Inclusion* three times higher ranked than Gen Z. German, Norwegian, Swedish Gen Z showed zero response, vs zero for Germany for Gen Y.
20	Most important when seeking brand assistance	• *Immediate resolution* highest (36%) vs second for Gen Y (32%). • *First Time Resolution of Issue* equal response for both (17%). • Norway & Sweden showed highest responses for *Immediate Resolution* and *Self-Service* for both cohorts.	• *Self-Service* highest (32%) and equal with second highest for Gen Z. • *Personalised* Response 10% higher than Gen Z (25% vs 15%) • Similar preference for both cohorts for *First Time Resolution* across countries.
21	Major negative factor when engaging with a brand	• *High Prices* highest cited factor (59%), three times more than Gen Y where it was second. • *Lack of Concise Content* equally ranked with Gen Y (13%) • *Poor Engagement Experience* highest for Norway, Sweden and Germany.	• *Poor Engagement Experience* highest (26%) and three times higher than Gen Z. • *Poor Values, Lack of Immediate Contact Options* also three times higher than Gen Z. • Germany had lowest *Lack of Concise Content* (5%) vs highest in the study for Germany (43%) for both cohorts.
22	One major improvement factor for a brand	• *Low Cost & High-Quality* dominant response for both but 7% higher for Gen Z (45%). • *Optimised, Fast & Social Media Presence* second selection and twice as high as Gen Y, as second to last selection. • *Drop 'Pretend Coolness'* third highest. Twice as high as Gen Y where it was the lowest ranked. Gen Z UK highest score (20%) with other countries 50% lower and below this score.	• *Honesty & Relevance* second selection vs second to last for Gen Z and four times higher than that cohort • *Ethical & ESG* fourth selection and twice as high as Gen Z. Norway and Sweden Gen Z scored zero supported by findings that Gen Z not necessarily always most socially active.[54] • *Fast Instant Engagement* third highest selection vs fourth highest for Gen Z with similar selection (11-13%).

[54] Torp, S., and Reirsen, J. (2020). Globalization, Work, and Health: A Nordic Perspective. International Journal of Environmental Research and Public Health; pp:: 1-20. https://doi.org/10.3390/ijerph17207661

23	Worst work-related support practices	• *No Instant/2-way messaging* was selected by 40% vs 35% for Gen Y, and was first and second choice respectively. • *Email/Contact Form Only* third highest (20%) for both cohorts and 5% than Gen Y.	• *Long Response Times* highest score (35%) vs second choice for Gen Z (25%). • *No Phone Number* and *Outdated/Static Intranet* equal last selections (10%). These were double and the same as Gen Z respectively.
24	Organisational support requirements	• *Chatbots & Live-Escalation* highest (38%) vs lowest for Gen Y (5%) • *Instant/Short response Times* second highest (25%), 5% above Gen Y as third highest factor. • *Ability to Contact Key Areas* similar responses for both (13-15%) and fourth for both cohorts.	• *Live Chat* highest response with 1/3 selecting it as first choice, four times higher than Gen Z and the lowest ranked for that cohort. • *Lowest Touch Points Possible* second highest score (28%), 10% higher than Gen Z and third highest factor for that cohort.
	Support		
	Worst work-related support practices	• Highest ranked was 40% selection of *No Instant/2-WayMessaging* vs 30% and second choice for Gen Y. • Third highest for both Gen Z & Y was *Email/Contact Forms Only* with 20% vs 15% respectively.	• *Long Response Times* was highest selection (35%) vs second highest fir Gen Z (25%). • *No Phone Number* equal fourth selection with *Outdated/Static Intranet* (10%) with first of these twice as high as Gen Z and the lowest factor for that cohort. The second factor scored equally for both Gen Y and Z and was fourth highest Gen Z factor
	Key required support attributes	• *Chatbot and Live Chat Escalation* scored highest at 40% and eight times higher than Gen Y, where it was the lowest scoring factor. • *Instant /Short Response Time* was the second highest response (25%) for both Gen Y & Z, with Gen Z 5% higher than Gen Y.	• *Live Chat* was the highest scoring at 33% vs 8% and lowest scoring factor for Gen Z. • *Lowest Touch Points* second highest factors (28%) vs third highest Gen Z and 10%b lower • *Ability to Contact Key Areas* was the fourth highest factor with a similar response (15).

Table C: Research summary by explored theme

Data Review and Analysis

This section assesses the 24 research questions in greater detail. This encompasses a three-tiered view of the data incorporating: (i) a summary of the averaged responses across the sample; (ii) a summary of the responses by cohort; (iii) a summary of the responses by cohort by country. The cohort and country data provide key reference points that the average results often mask, particularly where large variations exist in the results in the country results within a cohort. The variations observed between a number of country results are not believed to be significant and do not warrant country-specific conclusions. Research to date with larger sample sizes encompassing many of the explored themes indicates that a greater degree of homogeneity occurs with some minor country-specific variations resulting from cultural and social factors but at a low incidence.[55] At an overarching level country variations observed in this research do not obviate the conclusions being relevant on both a Pan-European basis and beyond in other geographic regions. The following present the results from the topical themes selected through the defined research questions:

Q1: What are your most important factors when selecting whether to work at an organisation?

This question represents the only investigation that included a forced ranking of three influencing factors. Table 1 depicts the results, with responders asked to select their three most significant influences when selecting an organisation, ranked in order of priority. The results indicate that both Gen Y and Gen Z were broadly aligned in their three choices and that these were also consistently observed across the five regions, with a minority of deviation. The key results highlight:

[55] Grous, A. (2017) Sky High Economics - Chapter One, op cit, Grous, A. (2019) Sky High Economics Chapter Three, op cit.; LSE research: 2018-2020. Op cit, including interviews with technology providers in the UK encompassing KMPG Cloud Practice that provided trends at sector, cohort and country-level trends.

- *Work flexibility* was selected by all Gen Z respondents as the first choice. Research before the pandemic indicates that salary was the primary factor in selecting an employer across both Gen Y and Gen Z, with Gen Z indicating an increasing propensity for *work-life balance.*[56] *Salary* featured as the second most significant first choice consideration for all countries except for Sweden. These results are mirrored for Gen Y responses for first and second preferences amongst the most influencing factor selected. *Career progression* is the third highest ranked first choice for Gen Z with the exception of Norwegian cohorts with third and fourth choice reflecting *career progression*. The variation with Gen Y is evident with the selection of *parenthood* as the third highest first-ranked influencing factor by Sweden and Norway, while the UK, French and German Gen Y cohorts selected *work-life balance* as the third highest first-ranked influencing factor.
- *Salary* featured as the highest second choice for Gen Z, with UK Gen Z selecting *flexibility* as the second choice, while French, German and Swedish Gen Z selected *work-life balance* as the second choice and Norwegian Gen Z selected *rapid career progression*. UK Gen Z showed the greatest distribution amongst a larger number of second choice factors that included *volunteering*, *culture and ESG*. All Gen Y selected *salary* as the second most influencing factor.
- *Personal satisfaction* is ranked the highest third choice influencing factor amongst all Gen Z and Gen Y with the exception of Gen Z in Sweden where *rapid progression* was ranked as the top third choice influencing factor. Greater variation was observed in the distribution of third choice influencing factors with these encompassing *work life balance* (UK), *rapid career progression* (Norway), *cultural factors* (France, Germany, Sweden). Swedish Gen Y was the only group to list the *parenthood* flexibility as an influencing factor for all three preferences (1-3). Norwegian Gen Y was the only group to list *technology* as a third choice influencing factor in selecting a work environment.

	UK Gen Z			France Gen Z			Germany Gen Z			Sweden Gen Z			Norway Gen Z		
	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3
Salary	22%	33%	4%	15%	50%	0%	10%	45%	0%	0%	50%	0%	29%	57%	0%
Flexibility (including remote, hybrid, hours worked)	49%	27%	2%	80%	0%	0%	75%	0%	0%	88%	0%	13%	43%	0%	0%
Personal satisfaction/meaningful work	13%	7%	33%	0%	15%	50%	0%	10%	45%	0%	13%	50%	14%	29%	43%
Rapid progression, fast feedback	2%	11%	27%	5%	5%	20%	0%	0%	15%	0%	0%	0%	14%	0%	29%
Skill development, mentoring with the opportunity to grow and learn	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Job security	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Work-life balance and well-being	7%	16%	16%	0%	30%	0%	5%	30%	5%	0%	38%	0%	0%	14%	0%
Parenthood flexibility	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Pet flexibility	0%	0%	0%	0%	0%	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%
Volunteering	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Culture/DEIB (diversity, equity, inclusion, and belonging)	7%	2%	13%	0%	0%	25%	5%	10%	25%	13%	0%	25%	0%	0%	14%
ESG (strong environmental, social and corporate governance)	0%	2%	4%	0%	0%	5%	5%	5%	5%	0%	0%	13%	0%	0%	14%
Technology use	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

	UK Gen Y			France Gen Y			Germany Gen Y			Sweden Gen Y			Norway Gen Y		
	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3
Salary	20%	42%	2%	15%	55%	5%	30%	50%	0%	14%	29%	0%	25%	50%	0%
Flexibility (including remote, hybrid, hours worked)	67%	2%	0%	75%	0%	0%	60%	0%	0%	71%	0%	0%	63%	13%	13%
Personal satisfaction/meaningful work	4%	18%	42%	0%	15%	45%	0%	20%	55%	0%	14%	29%	0%	0%	50%
Rapid progression, fast feedback	2%	7%	18%	0%	5%	15%	5%	0%	20%	0%	0%	43%	0%	13%	13%
Skill development, mentoring with the opportunity to grow and learn	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Job security	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Work-life balance and well-being	4%	27%	4%	10%	20%	20%	5%	15%	0%	0%	57%	0%	0%	13%	0%
Parenthood flexibility	0%	0%	0%	0%	0%	0%	0%	15%	0%	14%	0%	0%	13%	13%	13%
Pet flexibility	0%	2%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Volunteering	0%	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Culture/DEIB (diversity, equity, inclusion, and belonging)	2%	0%	27%	0%	0%	15%	0%	0%	25%	0%	0%	14%	0%	0%	0%
ESG (strong environmental, social and corporate governance)	0%	2%	2%	0%	0%	0%	0%	0%	0%	0%	0%	14%	0%	0%	0%
Technology use	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	13%

Table 1: Cohort preferences for selecting a place of work- Gen Z and Y results by country

[56] Ibid.

Additional observations for both Gen Y and Gen Z cohorts across the countries indicate:

- The highest first-choice factors reflected personal considerations such as *flexibility* and *salary* for both Gen Y and Gen Z.
- Other personal considerations such as *personal satisfaction* ranked higher for as a second choice but not as the first-choice factor.
- Other emerging factors such as *culture and diversity and ESG* ranked higher amongst both second and third choice influencing factors.
- Norwegian and Swedish Gen Y indicated a higher preference for *work-life balance* and *parenthood* than Gen Y in other countries, selecting this to a greater degree for all preferences (1-3) than other cohorts. This finding is congruent with the longer-term trend observed in Nordic Countries for the adoption of better work-life balance and greater 'happiness' both in the workplace and in society.[57][58]
- Some factors such as *technology* and *skills development* were negligible as an influencing factor. *Technology* referred to cohort expectations on technology adoption by the workplace in contrast to the specific use of technology. The latter displayed a high degree of importance and was explored through specific questions in the research.
- *Pet flexibility* registered a very low response, while *volunteering* and *job security* were not selected by any respondents. In contract, the notion of job security has evolved with research indicating that the recession of 2007-2009 influenced this into 2014-2016 for Gen Y in particular, where it was consistently depicted as the most significant influencing factor before rapidly migrating to a low position by 2017 and either not being depicted post-2018, or with very low frequency.[59]

Table 2 depicts a summary of the responses by the two cohorts averaged across the sample by the three prioritised preferences 1-3 with the variation between responses for Gen Y and Gen Z respondents calculated, using Gen Z as the benchmark: a higher selection by Gen Y responders for the influencing factor is depicted in blue and a lower response is indicated in red.

	Gen Z			Gen Y			Difference in Responses: Gen Y vs Gen Z		
	Gen Z- 1	Gen Z- 2	Gen Z- 3	Gen Y- 1	Gen Y- 2	Gen Y- 3	1	2	3
Salary	17%	42%	2%	21%	46%	2%	4%	4%	0%
Flexibility (including remote, hybrid, hours worked)	63%	12%	2%	67%	2%	1%	4%	-10%	-1%
Personal satisfaction/meaningful work	7%	11%	41%	2%	16%	45%	-5%	5%	4%
Rapid progression, fast feedback	3%	6%	21%	2%	5%	19%	-1%	-1%	-2%
Skill development, mentoring with the opportunity to grow and learn	0%	0%	0%	0%	0%	1%	0%	0%	1%
Job security	0%	0%	0%	0%	0%	0%	0%	0%	0%
Work-life balance and well-being	4%	23%	8%	5%	24%	6%	1%	1%	-2%
Parenthood flexibility	0%	0%	0%	2%	4%	1%	2%	4%	1%
Pet flexibility	0%	0%	1%	0%	1%	1%	0%	1%	0%
Volunteering	0%	1%	0%	0%	1%	0%	0%	0%	0%
Culture/DEIB (diversity, equity, inclusion, and belonging)	5%	3%	19%	1%	0%	21%	-4%	-3%	2%
ESG (strong environmental, social and corporate governance)	1%	2%	6%	0%	1%	2%	-1%	-1%	-4%
Technology use	0%	0%	0%	0%	0%	1%	0%	0%	1%

Table 2: Cohort preferences for selecting a place of work - Gen Y and Gen Z average consolidated results

Chart 1 depicts the comparison by cohort of the influencing factors by preference.

[57] Nijp, H. H., Beckers, D. G., Geurts, S. A., Tucker, P., Kompier, M. A. (2012). Systematic review on the association between employee worktime control and work/non-work balance, health and well-being, and job-related outcomes. Scandinavian Journal of Work, Environment & Health. V(380; pp: 299–313. DOI: 10.5271/sjweh.3307

[58] Torp, S., and Reirsen, J. (2020). Globalization, Work, and Health: A Nordic Perspective. International Journal of Environmental Research and Public Health; pp:: 1-20. https://doi.org/10.3390/ijerph17207661

[59] Grous, A. (2017) Sky High Economics - Chapter One, op cit, Grous, A. (2019) Sky High Economics Chapter Three, op cit.; LSE research: 2018-2020. Op cit, including interviews with technology providers in the UK encompassing KMPG Cloud Practice (2020) that provided trends at sector, cohort and country-level trends.

The results indicate:

- First choice influencing factor ('1'):
    - Positive variation: Gen Y displays a marginally greater selection of *salary* and *flexibility* in work than Gen Z (4%); *parenthood* options displays a small higher variation between the two (2%); *work life balance* and *well-being* displays a very small increase between the two (1%).
    - *Negative variation*: Gen Y displays a lower priority in *personal satisfaction/meaningful work* than Gen Z (5%); a lower emphasis on *culture* (4%); a lower emphasis on *ESG and rapid progression* (1%)
- Second choice influencing factor ('2'):
    - *Positive variation:* Gen Y displays the highest preference above Gen Z *for personal satisfaction* (5%) followed equally by *salary* and *parenthood flexibility* (both 4% higher) and a negligible preference above Gen Z for both *work life balance* and *pet flexibility* (both 1% higher)
    - Negative variation: The highest variation in the questions occurs for flexibility of work, with 10% fewer Gen Y than Gen Z selecting this followed by culture (3% lower) and equally by ESG and rapid progress (both 1% lower).
- Third choice influencing factor ('3'):
    - *Positive variation:* Gen Y displays a higher preference for *personal satisfaction* then Gen Z (4%) followed by *culture* (2%) and negligibly higher for *skills development*, *parenthood flexibility* and *technology* (all 1% higher).
    - *Negative variation:* Gen Y displays the highest variation with Gen Z responses for *culture* (4% lower) followed equally *by rapid progress* and *work-life balance* (both 2% lower) and negligibly lower for *flexibility* (1% lower).

The overall trends are:

- The first, second and third most significant factors cited by both cohorts for workplace attraction are *flexibility, salary,* and *personal satisfaction r*espectively.
- Close alignment is evident for the first choice influencing factors between Gen Y and Gen Z with this varying marginally for some second and third choice factors of influence.
- *ESG* is significantly stronger as an influencing factor for Gen Z as a second-choice influence compared to Gen Y where it is a negligible factor.
- Gen Z indicated the influence of *culture, diversity, and inclusion* significantly more than Gen Y for a first choice influencing factor, with this harmonising between the two cohorts for third choice influence.
- Younger Gen Y cohorts showed closer alignment with Gen Z.

This research extends previous LSE research to indicate the emergence of several trends:

- Although a lower priority influencing factor at present, *ESG and culture and diversity* are likely to continue emerging in importance, migrating from lower to higher priority considerations.
- *Flexibility* and *well-being* are likely to also continue strengthening in importance, with the latter likely to move from a high second choice to a higher first choice, while *flexibility* is likely to continue increasing in importance as a first choice across all cohorts.

The additional questions in this research involve the selection of one influencing factor only.

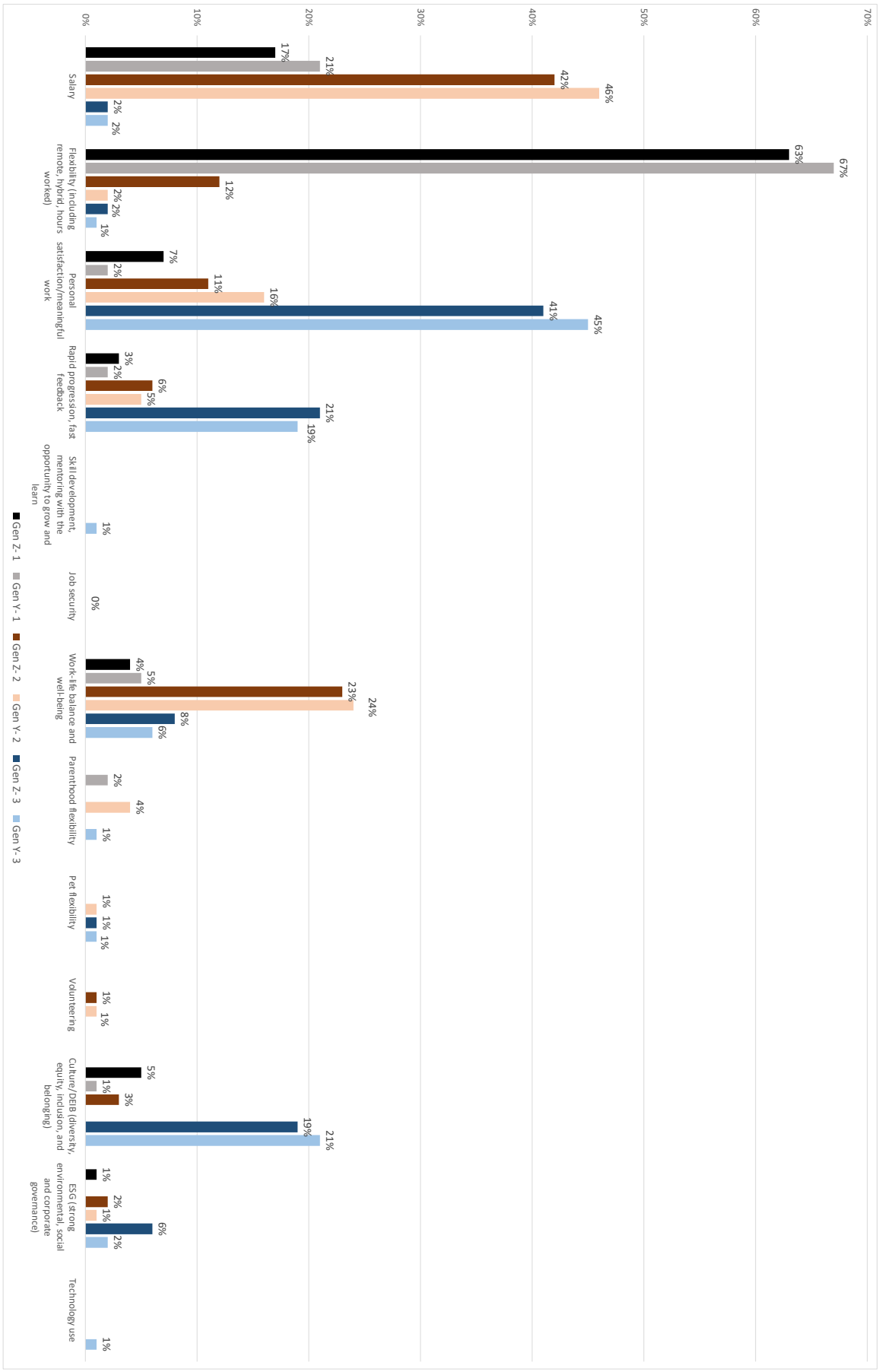

Chart 1: Cohort preferences for selecting a place of work

Q2 What is the primary reason you would leave/have left a job?

The average results across cohorts and countries indicate that the primary factor spurring the exit from an organisation is a lack of engagement with the individual with this encompassing a plethora of factors such as a lack of feedback; 'care' for their welfare; a focus on company and not personal performance, and others. This was followed by a key emerging factor: the desire to travel. This result has been observed strongly in research with Gen Y indicating that travel and leisure were strong factors in taking extended leave and in exiting a company in preference to another that provided greater number of days for annual leave and greater work flexibility.[60] Table 3 consolidates the results:

	Split %
Culture, and/or DEIB or ESG	7%
Lack of flexibility	10%
Bad manager including blocking, 'doesn't get you', unapproachable, won't listen	13%
Lack of engagement by the organisation	19%
Boredom	10%
Lack of career advancement	15%
Lack of work-life balance	10%
Travel	16%
Burnout	3%
Total	100%

Table 3: Cohort factors for exiting an organisation across the sample and countries

Travel was a stronger selection amongst Gen Y (18%) versus Gen Z (13%) and varied between countries, with no indication of this as an influencing factor for Gen Z in Nordic countries, and only prevalent for Norway for Gen Y (25%). The results for both cohorts across the countries indicate:

- the primary drivers for both cohorts exiting an organisation included a *lack of organisational engagement, a lack of career advancement, travel, boredom* and *a 'bad manager'*;
- major variations were evident within some of these results with a lack of *career advancement and boredom* cited by twice as many Gen Z than Gen Y;
- *burnout* was cited by some Gen Y versus a zero response for Gen Z, indicating the wider age range and greater years in the workforce by some within this cohort;

These results are depicted in Tables 4 and 5:

	Split %
Culture, and/or DEIB or ESG	6%
Lack of flexibility	9%
Bad manager including blocking, 'doesn't get you', unapproachable, won't listen	11%
Lack of engagement by the organisation	19%
Boredom	13%
Lack of career advancement	20%
Lack of work-life balance	9%
Travel	13%
Burnout	0%
Total	100%

Table 4: Gen Z factors for exiting an organisation across countries

	Split %

[60] Grous, A. (2019) Sky High Economics - Chapter Three: Capitalising on changing passenger behaviour in a connected world, https://www.lse.ac.uk/business/consulting/assets/documents/sky-high-economics-chapter-three.pdf

Culture, and/or DEIB or ESG	8%
Lack of flexibility	10%
Bad manager including blocking, 'doesn't get you', unapproachable, won't listen	15%
Lack of engagement by the organisation	18%
Boredom	6%
Lack of career advancement	9%
Lack of work-life balance	11%
Travel	18%
Burnout	5%
Total	100%

Table 5: Gen Y factors for exiting an organisation across countries

Tables 6 and 7 depict cohort responses by country, with key variations including:

- For Gen Z, *culture and related factors* were noticeably strong factors in Nordic countries while this was absent in France, low in Germany and negligible in the UK.
- A *bad manager* displayed significant variation amongst Gen Z responders: 43% of Norwegian responders cited this, versus zero Swedish responders, and 5-11% amongst others.
- *A lack of career advancement* and *work life balance* were evident for Gen Z, except for a zero rating by Norwegian responders. This was due to their belief that this category encompassed a '*blocking' of career progression*, *a lack of a work-life balance*, and *boredom*, reflected by a high response rate for this category and similarly, by German Gen Z responses for *a lack of career advancement* that was believed to encapsulate *a lack of work-life balance.*

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Culture, and/or DEIB or ESG	2%	0%	5%	25%	29%
Lack of flexibility	4%	10%	10%	25%	14%
Bad manager including blocking, 'doesn't get you', unapproachable, won't listen	11%	5%	10%	0%	43%
Lack of engagement by the organisation	22%	20%	15%	13%	14%
Boredom	13%	15%	15%	13%	0%
Lack of career advancement	20%	15%	35%	13%	0%
Lack of work-life balance	11%	15%	0%	13%	0%
Travel	16%	20%	10%	0%	0%
Burnout	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%

Table 6: Gen Z factors for exiting an organisation by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
Culture, and/or DEIB or ESG	7%	10%	10%	14%	0%
Lack of flexibility	4%	15%	15%	29%	0%
Bad manager including blocking, 'doesn't get you', unapproachable, won't listen	13%	15%	10%	29%	25%
Lack of engagement by the organisation	22%	10%	10%	14%	38%
Boredom	4%	15%	0%	0%	13%
Lack of career advancement	4%	10%	20%	14%	0%
Lack of work-life balance	13%	10%	15%	0%	0%
Travel	27%	5%	15%	0%	25%
Burnout	4%	10%	5%	0%	0%
Total	100%	100%	100%	100%	100%

Table 7: Gen Y factors for exiting an organisation by country

Gen Y results by country highlighted a number of key findings:

- The use of the category of *bad manager* by Nordic countries as a proxy for *a lack of flexibility, career advancement,* and *work-life balance*, reflecting a similar trend observed for Gen Z.
- *Travel* was a major consideration for UK, Norwegian and German Gen Y.
- *Lack of career advancement* was the highest selected exit reason for German Gen Y, but amongst the lowest for UK and French cohorts, with these countries showing a skew to *lack of organisational engagement* compared to German Gen Y.
- *Burnout* was only cited by French Gen Y followed by German and UK responders respectively. This is congruent with research that highlights how an enhanced social structure supports a 'happier' workforce and population, with Nordic countries depicted as being amongst most content in the world.[61]

Q3 What do you believe is the worst management practice in an organisation/where you have worked?

The highest cited negative management practice in the study across cohorts and countries was the use of *helicopter management* from 'top down' without more granular engagement with employees. This was followed by *a lack of ongoing feedback* and *a lack of work flexibility* in a cluster, followed by a third group of *poor values, a disregard for well-being* and management that was believed to be *'old school' and not relevant,* along with technology adoption that was also considered to be *outdated or unfit for purpose.* Table 8 depicts these results:

	Split %
Lack of work flexibility, strict hours	17%
Lack of ongoing feedback, communication & training	18%
'Old school'/outdated technology	12%
'Helicopter management'/lack of responsibility	28%
No regard for well-being and mental health	13%
Poor values and social-cause activities	14%
Total	100%

Table 8: Cohort summary for the worst organisational management practices.

Tables 9 and 10 depict the Gen Y and Gen Z consolidated results across the countries. These indicate:

- Major variations occurred between Gen Y and Gen Z with three categories: Gen Y placed a significantly higher value than Gen Z on *ongoing feedback, communication and training* and *well-being and mental health.*
- Gen Z placed a higher value on *organisational values* and *social responsibility* that was three times higher than the Gen Y preference.

	Split %
Lack of work flexibility, strict hours	17%
Lack of ongoing feedback, communication & training	14%
'Old school'/outdated technology	12%
'Helicopter management'/lack of responsibility	28%
No regard for well-being and mental health	9%
Poor values and social-cause activities	20%
Total	100%

Table 9: Gen Z summary for the worst organisational management practices.

	Split %

[61] Oxfeldt, E., Nestingen , A., Simonsen, P. (2017). The Happiest People on Earth? Scandinavian Narratives of Guilt and Discontent Scandinavian Studies. V(89)4; p[p: 429-446.

Lack of work flexibility, strict hours	16%
Lack of ongoing feedback, communication & training	21%
'Old school'/outdated technology	12%
'Helicopter management'/lack of responsibility	28%
No regard for well-being and mental health	16%
Poor values and social-cause activities	7%
Total	100%

Table 10: Gen Y summary for the worst organisational management practices.

A number of variations were observed across Gen Z responses between countries:

- German Gen Z did not rank *lack of work flexibility* at all but as observed with a number of questions, the view provided for this category reflected categories encompassing lack of feedback, 'old school' practices and technology.
- Nordic country Gen Z depicted a higher preference for *technology* as a good practice, but *helicopter management* was not ranked as low as Gen Z in other countries.
- An absence of a score was evident for *mental health* and *well-being* amongst Nordic countries with some responders perceiving that this was reflected in *helicopter management*.[62]
- UK Gen Z displayed the strongest negative score for an *organisation that lacked strong social values and did not support social causes.*

Tables 11-12 depict Gen Y and Gen Z responses across the countries:

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Lack of work flexibility, strict hours	18%	25%	0%	25%	29%
Lack of ongoing feedback, communication & training	13%	15%	10%	25%	14%
'Old school'/outdated technology	7%	15%	10%	25%	29%
'Helicopter management'/lack of responsibility	31%	30%	30%	13%	14%
No regard for well-being and mental health	4%	10%	25%	0%	0%
Poor values and social-cause activities	27%	5%	25%	13%	14%
Total	100%	100%	100%	100%	100%

Table 11: Gen Z responses for the worst organisational management practices by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
Lack of work flexibility, strict hours	22%	10%	10%	14%	13%
Lack of ongoing feedback, communication & training	13%	25%	30%	29%	25%
'Old school'/outdated technology	13%	15%	5%	14%	13%
'Helicopter management'/lack of responsibility	27%	30%	25%	29%	38%
No regard for well-being and mental health	18%	15%	15%	14%	13%
Poor values and social-cause activities	7%	5%	15%	0%	0%
Total	100%	100%	100%	100%	100%

Table 12: Gen Y responses for the worst organisational management practices by country

Gen Y displayed a mix of alignment with some Gen Z response and a contrast with others:

- Country responses for *poor values and social activities* were markedly higher for Gen Z, confirming research that younger cohorts represent one of the more engaged 'vocal' groups.[63]

[62] Oxfeldt et al., (2017). Op cit.

[63] Bergmann, Z., and Ossewaarde, R. (2020). Youth climate activists meet environmental governance: Ageist depictions of the FFF movement and Greta Thunberg in German newspaper coverage. Journal of Multicultural Discourse. V(15); pp:267–290. doi: 10.1080/17447143.2020.1745211

- The lack of any score by Nordic countries for *poor values and social causes* reflects the belief by many responders that the category of *helicopter management/lack of responsibility* also encompassed a poor corporate social ethos. The resulting higher score for this category reflects the incorporation of results also relevant for the category of *poor values* for Gen Z.
- Gen Y displayed a greater uniformity of responses by category across countries with some variations evident including over twice as many UK Gen Y rating *a lack of flexibility* as a negative management practice versus some of the other country Gen Y. This reflects trends observed with UK workers appearing to be amongst the most resistant in the EU to accepting more rigid working arrangements post Covid-19 lockdowns.[64]
- Only French Gen Y indicated a low response for *outdated technology* with a focus appearing to be on *management culture* and *managerial approach a*s priorities.

Q 4 What working mode do you prefer?

Almost half of the sample indicated a preference to work both in a team and independently. Around one third prefer to work in a team, with the remainder preferring to work independently. This varies between Gen Y and Gen Z, with Gen Y indicating almost a two-fold higher preference to work in a team (40%) compared to Gen Z (23%). In contrast, Gen Z indicates around a two-and a half times higher preference to work independently (35%) than Gen Y (14%). Tables 13-15 summarise the results:

	Split %
Working in a team	32%
A mix of team and independent	44%
Primarily independent	25%
Total	100%

Table 13: Cohort summary for working mode preferences

	Split %
Working in a team	23%
A mix of team and independent	42%
Primarily independent	35%
Total	100%

Table 14: Gen Z summary for working mode preferences

	Split %
Working in a team	40%
A mix of team and independent	46%
Primarily independent	14%
Total	100%

Table 15: Gen Y summary for working mode preferences

These results reflect behavioural and other Gen Z characteristics:

- a preference to undertake individual tasks as opposed to teamwork; [65]
- a greater sense of 'determination';
- technology-native; [66]

[64] LSE research: 2018-2020. Op cit; including interviews with technology providers in the UK encompassing KMPG Cloud Practice and IBM Global Business Services (EU) (2020) that provided trends at sector, cohort and country-level trends.

[65] Dobrowolski, Z., Drozdowski, G., Mirela, P. (2020). Understanding the Impact of Generation Z on Risk Management—A Preliminary Views on Values, Competencies, and Ethics of the Generation Z in Public Administration. International Journal of Environmental Research and Public Health. V19(7); pp: 1-13; DOI:10.3390/ijerph19073868.

[66] Ibid.

- a desire to receive rapid promotion to a managerial role;[67]
- a willingness to change direction 'spontaneously' including in work and socially.[68]

Tables 16-17 indicate that the results were relatively consistent across the countries for both cohorts:

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Working in a team	27%	25%	20%	13%	14%
A mix of team and independent	36%	45%	50%	50%	43%
Primarily independent	38%	30%	30%	38%	43%
Total	100%	100%	100%	100%	100%

Table 16: Gen Z responses for the worst organisational management practices by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
Working in a team	36%	40%	45%	57%	38%
A mix of team and independent	49%	55%	35%	29%	50%
Primarily independent	16%	5%	20%	14%	13%
Total	100%	100%	100%	100%	100%

Table 17: Gen Y responses for the worst organisational management practices by country

French Gen Y provided the lowest preference for individual activity and the highest preference for a mix of teamwork and independent effort. Gen Y responders also displayed a preference for independent effort that was over three times lower in some countries than Gen Z. These results are consistent with older Gen Y results (25+ years of age) that indicate a preference for teamwork, knowledge acquisition, work-life balance.[69]

Q 5 What are your preferred communication modes with your work organisation?

The average results across the study indicate that cohorts preferred *digital engagement* within their workplace, followed marginally behind by *face-to-face, video* and *telephone communication*. Gen Z diverged with Gen Y with almost 40% of Gen Z preferring digital modes versus 26% for Gen Y. In addition, Gen Z second preference was for face-to-face communication while Gen Y preferred *video communication* as the first choice, followed equally by *digital modes* and *face to face communication*. These results are congruent with the observed digitally native nature of Gen Z and in the preference of this cohort directly address areas such as their performance directly with their line managers but often with less team engagement.[70] Tables 18-20 depict the consolidated results:

	Split %
Digital (email, WhatsApp, IM, text etc)	32%
Face to face	29%
Telephone	15%
Video (e.g., Teams, Zoom, etc)	24%
Total	100%

Table 18: Cohort summary for work communication modes

[67] Cho, M., Bonn, M., Han, S.(2018). Generation Z's sustainable volunteering: Motivations, attitudes and job performance. Sustainability; V(10)5; 1400; https://doi.org/10.3390/su10051400

[68] Rzemieniak, M., Wawer, M. (2021). Employer Branding in the Context of the Company's Sustainable Development Strategy from the Perspective of Gender Diversity of Generation Z. Sustainability; V(13), 828; https://doi.org/10.3390/su13020828

[69] Iorgulescu, M. (2016). Generation Z and its perception of work. Cross-Cultural Management Journal. V(9)1; pp: 47-54. https://EconPapers.repec.org/RePEc:cmj:journl:y:2016:i:9:p:47-54

[70] Lee, C., Aravamudhan, V., Roback, T., Lim, H., Ruane, S. (2021). Factors impacting work engagement of Gen Z employees: A regression analysis. Journal of Leadership, Accountability and Ethics. V(18)3; pp.147-159. https://doi.org/10.33423/jlae.v18i3.4414

	Split %
Digital (email, WhatsApp, IM, text etc)	38%
Face to face	32%
Telephone	11%
Video (e.g., Teams, Zoom, etc)	19%
Total	100%

Table 19: Gen Z summary for work communication modes

	Split %
Digital (email, WhatsApp, IM, text etc)	26%
Face to face	26%
Telephone	19%
Video (e.g., Teams, Zoom, etc)	29%
Total	100%

Table 20: Gen Y summary for work communication modes

The key country observations include:

- UK, France and Sweden Gen Z preferred *digital communication* while Norwegian and German Gen Z preferred *face-to-face* and *video modes*.
- Nordic countries showed a zero preference for the use of *telephony* for Gen Z with this also reflected by Gen Y for these countries. This engagement mode was rated the lowest by all Gen Z. In contrast, Gen Y UK, French, and German cohorts depicted a higher preference for the use of this mode for communication.
- Nordic Gen Z showed a five-fold preference for *video* versus UK Gen Z and a ten-fold preference versus French Gen Z. In contrast, the UK showed the lowest preference for *video* amongst Gen Y, with Nordic Gen Y showing a three-fold greater preference for this mode than UK Gen Z, with French and German Gen Y rating this in between these results.

Tables 21-22 depict these results:

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Digital (email, WhatsApp, IM, text etc)	47%	45%	20%	38%	14%
Face to face	27%	40%	35%	38%	29%
Telephone	16%	10%	10%	0%	0%
Video (e.g., Teams, Zoom, etc)	11%	5%	35%	25%	57%
Total	100%	100%	100%	100%	100%

Table 21: Gen Z work communication modes by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
Digital (email, WhatsApp, IM, text etc)	38%	10%	20%	14%	25%
Face to face	24%	25%	35%	29%	13%
Telephone	20%	35%	15%	0%	0%
Video (e.g., Teams, Zoom, etc)	18%	30%	30%	57%	63%
Total	100%	100%	100%	100%	100%

Table 22: Gen Y work communication modes by country

Q6 What makes the ideal technology work environment?

The average results across countries and cohorts indicate that *the use of a laptop and/or home network tool*s was the preferred option (32%), followed by *instant messaging (IM)* (28%), *collaborative apps* (23%) and *smartphones* (19%), as depicted in Table 23. At a cohort level, over twice the number of Gen Z list *the use of a smartphone* as a preference (25%) versus Gen Y (12%). This result is congruent

with research that highlights the intrinsic use of smartphones by Gen Z for work and non-work activities.[71][72] Gen Y depicts a higher preference for *IM* and *collaborative apps* for work than Gen Z (30% vs 25%, and 27% vs 18% respectively). Tables 23-25 depict these results:

	Split %
Use own smartphone	19%
Use a laptop and/or home connectivity/work anywhere	32%
Use IM and social media for work	28%
Collaborative apps such as Slack, Workplace, etc	23%
Total	100%

Table 23: Cohort summary for an ideal technology work environment

	Split %
Use own smartphone	25%
Use a laptop and/or home connectivity/work anywhere	32%
Use IM and social media for work	25%
Collaborative apps such as Slack, Workplace, etc	18%
Total	100%

Table 24: Gen Z summary for an ideal technology work environment

	Split %
Use own smartphone	12%
Use a laptop and/or home connectivity/work anywhere	31%
Use IM and social media for work	30%
Collaborative apps such as Slack, Workplace, etc	27%
Total	100%

Table 25: Gen Y summary for an ideal technology work environment

Country results depict a number of key observations

- Nordic Gen Z showed the highest preference for smartphones to be utilised for work with Germany and the UK depicting the lowest preference. They expressed a stronger preference to utilise work-supplied laptops or secure dial-in as primary engagement modes with smartphone use limited to WhatsApp groups, text, and occasional work email use.
- Smartphones were perceived by many of these cohorts as being 'separate' to work tools and utilised primarily for personal use with work use perceived to be a secondary aspect. In contrast, Nordic Country and French Gen Z overwhelmingly indicated their willingness to use smartphones for work.
- Collaborative apps were the lowest ranked option amongst Gen Z while they were the highest ranked amongst German and Nordic Gen Y cohorts who did not indicate any preference for utilising smartphones with this mode ranked the lowest amongst all Gen Y cohorts who indicated a preference for non-smartphone options.

The country comparisons for Gen Y and Z and depicted in tables 26 and 27:

[71] LSE research: 2018-2020. Op cit; including interviews with technology providers in the UK encompassing KMPG Cloud Practice and IBM Global Business Services (EU) (2020) that provided trends at sector, cohort and country-level trends.

[72] Puiu, S., Demyen, S., Tănase, A.-C.; Vărzaru, A., Bocean, C.G. (2022) Assessing the Adoption of Mobile Technology for Commerce by Generation Z. Electronics. V(11); 866. https://doi.org/10.3390/electronics11060866

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Use own smartphone	22%	30%	15%	38%	43%
Use a laptop and/or home connectivity/work anywhere	38%	25%	35%	13%	29%
Use IM and social media for work	22%	25%	35%	38%	0%
Collaborative apps such as Slack, Workplace, etc	18%	20%	15%	13%	29%
Total	100%	100%	100%	100%	100%

Table 26: Gen Z summary for an ideal technology work environment by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
Use own smartphone	16%	15%	10%	0%	0%
Use a laptop and/or home connectivity/work anywhere	31%	35%	25%	29%	38%
Use IM and social media for work	36%	25%	30%	14%	25%
Collaborative apps such as Slack, Workplace, etc	18%	25%	35%	57%	38%
Total	100%	100%	100%	100%	100%

Table 27: Gen Y summary for an ideal technology work environment by country

Q 7 How can organisations optimise internal employee engagement?

The average sample results indicate that the preferred mode to optimise internal employee engagement is through the provision of *Chatbots and AI* (28%), followed by *self-service* (23%) with a grouping of similarly ranked preferences encompassing *push-responses to smartphones via apps and email*, *short-response times to queries* and, *the lowest number of online engagement touchpoints*. The average results are congruent with research that indicates that the use of Chatbots by Gen Z and younger Gen Y is expected to continue increasing as a higher-choice selection by both cohorts.[73] The average results indicate that this preference was followed by the last-ranked factor of *collaborative content and sharing*. In contrast, Gen Z indicated a preference for s*elf-service, AI* and *short response times* compared to Gen Y, who indicated a preference *for a low number of touchpoints* and *collaborative content*. Tables 28-30 depict these results:

	Split %
Offer more self-service online	23%
Provide Chatbots and AI for relevant queries	28%
Push-responses to smartphones via apps, email and texts	16%
Offer short response times	14%
Deliver the lowest number of touchpoints for online engagement	14%
Collaborative content and sharing	6%
Total	100%

Table 28: Cohort summary for optimising internal employee engagement

	Split %
Offer more self-service online	29%
Provide Chatbots and AI for relevant queries	30%
Push-responses to smartphones via apps, email and texts	19%
Offer short response times	13%
Deliver the lowest number of touchpoints for online engagement	7%
Collaborative content and sharing	2%
Total	100%

Table 29: Gen Z summary for optimising internal employee engagement

[73] Soni, R. (2020). Trust in Chatbots: Investigating key factors influencing the adoption of Chatbots by Generation Z. Mukht Shabd Journal. V(IX)V; pp:5528-5543. DOI:10.18231/2454-9150.2018.1343

	Split %
Offer more self-service online	17%
Provide Chatbots and AI for relevant queries	25%
Push-responses to smartphones via apps, email and texts	13%
Offer short response times	15%
Deliver the lowest number of touchpoints for online engagement	20%
Collaborative content and sharing	10%
Total	100%

Table 30: Gen Y summary for optimising internal employee engagement

The country results highlight the divergence between Gen Y and Gen Z, with the preference by Gen Z for *self-service* and *Chatbot/AI* in contrast to a preference for *fewer touchpoints* and *shorter response times* by Gen Y. Norway Gen Z results were polarised between *self-service* (57%) and *short response times, low number of touchpoints* and *collaborative content* (14% each), as depicted in Tables 31-32:

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Offer more self-service online	24%	25%	35%	25%	57%
Provide Chatbots and AI for relevant queries	29%	35%	35%	38%	0%
Push-responses to smartphones via apps, email and texts	20%	30%	15%	13%	0%
Offer short response times	11%	10%	15%	25%	14%
Deliver the lowest number of touchpoints for online engagement	13%	0%	0%	0%	14%
Collaborative content and sharing	2%	0%	0%	0%	14%
Total	100%	100%	100%	100%	100%

Table 31: Gen Z country results for optimising internal employee engagement

	K Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
Offer more self-service online	13%	20%	25%	29%	0%
Provide Chatbots and AI for relevant queries	24%	35%	25%	14%	13%
Push-responses to smartphones via apps, email and texts	11%	10%	15%	14%	25%
Offer short response times	13%	20%	15%	14%	13%
Deliver the lowest number of touchpoints for online engagement	22%	15%	15%	29%	25%
Collaborative content and sharing	16%	0%	5%	0%	25%
Total	100%	100%	100%	100%	100%

Table 32: Gen Y country results for optimising internal employee engagement

Q8 What experiences from your personal life would like to see your work adopt?

At a consolidated level, on average, almost one-third of the sample listed *faster communication within the workplace* as the highest preference, followed by *greater 'smart support'* and *self-serve*. A close grouping occurred between other factors, while the greater use of smartphones was ranked the lowest preference. The greatest divergence between Gen Y and Gen Z responses occurred in the use of smartphones, with Gen Z indicating a very low preference for this (3%) versus a three-fold higher preference by Gen Y (10%). A key factor contributing to this is the ubiquity of smartphones and the perception by many that their use both in and out of the workplace was the new normal and as such this category did not warrant separate consideration. Other categories showed broad alignment between the cohorts indicating that overall, the defined factors were applicable to both Gen Y and Gen Z. Tables 33-35 depict the results:

	Split %
Openness in communication	15%
Respect from others	11%
Faster communication	29%
Greater use of smartphones and IM	7%
Continued hybrid/flexible working	16%
Smarter support, more self-serve	23%
Total	100%

Table 33: Cohort summary for personal to work-life experience application

	Split %
Openness in communication	13%
Respect from others	9%
Faster communication	31%
Greater use of smartphones and IM	10%
Continued hybrid/flexible working	15%
Smarter support, more self-serve	22%
Total	100%

Table 34: Gen Z country results for personal to work-life experience application

	Split %
Openness in communication	16%
Respect from others	13%
Faster communication	27%
Greater use of smartphones and IM	3%
Continued hybrid/flexible working	17%
Smarter support, more self-serve	24%
Total	100%

Table 35: Gen Y country results for personal to work-life experience application

The results between cohorts by country reflect a heterogeneous mix with Gen Z respondents varying in their use of smartphones: only UK, German and Swedish respondents indicate a preference for their use, while Norwegian and French Gen Z utilised their smartphones for non-work use. In contrast, Norway Gen Y displayed this as a higher priority (25%) with a small proportion of German Gen Y cohorts responding positively (5%). Over 70% of Norwegian Gen Z responders indicated that *faster communication* was the most significant priority with the remainder selecting *greater openness in communication*. Tables 36-38 depict these results:

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Openness in communication	9%	10%	20%	13%	29%
Respect from others	4%	20%	10%	13%	0%
Faster communication	22%	30%	35%	38%	71%
Greater use of smartphones and IM	18%	0%	5%	13%	0%
Continued hybrid/flexible working	18%	20%	10%	13%	0%
Smarter support, more self-serve	29%	20%	20%	13%	0%
Total	100%	100%	100%	100%	100%

Table 36: Gen Z personal to work-life experience application by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y

Openness in communication	20%	15%	10%	29%	0%
Respect from others	11%	10%	10%	14%	38%
Faster communication	29%	30%	20%	29%	25%
Greater use of smartphones and IM	0%	0%	5%	0%	25%
Continued hybrid/flexible working	22%	10%	20%	14%	0%
Smarter support, more self-serve	18%	35%	35%	14%	13%
Total	100%	100%	100%	100%	100%

Table 37: Gen Y summary for personal to work-life experience application by country

Cohort responses highlighted a number of key observations:

- *Faster communication* was the highest ranked factor selected by Gen Z in all countries with a relatively balanced distribution of responses observed across other preferences, except for Norwegian cohort responses that were polarised between two selections.
- Gen Y displayed a more consistent distribution in preferences across the countries, with the exception of *greater smartphone use*, with this option a very low priority. This was selected by some Gen Z to a greater degree than Gen Y, but this was confined to two countries (UK and Sweden) with German responses negligible (5%) and zero selection occurring by other Gen Z. This reflects the observation that both cohorts perceive smartphone use as an ingrained element of both workplace and non-workplace activities without this mode being perceived as a migrated aspect between the two environments.
- These results indicate that the defined influencing factors appear to be relevant for both cohorts across the countries with no trends evident. Responses are congruent with evidence that multiple factors affect both Gen Y and Gen Z as they migrate their expectations into their workplace including the need for a positive organisational culture[74] and technology that enhances *speed* across organisational areas and activities, and ease of use.[75][76]

These factors are in a state of flux with many Gen Z lacking workplace experience but possessing a disproportionate input into workplace design (virtual and/or physical) along with Gen Y.[77] These factors are relevant in a post-Covid-19 environment as organisations evolve to accommodate the accelerated digitalisation that commenced before the pandemic but was spurred during its onset and is now firmly ensconced in the expectations and prioritisations of Gen Y and Gen Z.

Q9 What do you think will be the next big trend in technology and how will companies adopt it to engage customers and employees?

O*mni-channel support* and *good, smart self-servic*e were ranked equally as the highest ranked prediction of trends to enhance customer service and employee engagement with their organisation. *Real-time messaging* was rated higher than alternatives such as *personalised content, social media* and *augmented reality*, as depicted in Table 38. Variations were observed between Gen Y and Gen Z preferences with around 60% of Gen Y selecting *omni-channels* and *good, smart service* as their

[74] Garingging, R., and Saluy, A. (2020). Influence of Leadership, Organizational Culture, and Millennial Employee Performance Compensation (Case Study in Pt. XYA Company. IRE Journals. V(4)1; pp: 75-89. e-ISSN: 2456-8880

[75] Canedo, J., Graen, G., Johnson, R. (2017). Navigating the New Workplace: Technology, Millennials, and Accelerating HR Innovation. AIS Transactions on Human-Computer Interaction. V(9)3; pp: 243-260. DOI:10.17705/1THCI.00097

[76] LSE productivity and technology research and interviews with UK enterprise managers, op cit.

[77] Latkovikj, M., and Popovska, M. (2020). How Millennials, Gen Z, and Technology are Changing the Workplace Design. Conference: STPIS 2020 Socio-Technical Perspective in IS Development. Virtual conference in Grenoble, France, June 8-9. http://ceur-ws.org/Vol-2789/paper8.pdf

highest ranked predictions. Around 40% of Gen Z selected these, with an additional 16% also selecting *real-time messaging*, aligning overall with Gen Y. Tables 38-40 depict these results:

	Split %
More f2f video	10%
Omni channel use for support	25%
Good, smart self service	24%
Real time messaging vs email	16%
Personalised content via predictive/AI	10%
Social media for customer service	11%
Augmented reality for customer service	6%
Total	100%

Table 38: Cohort summary for technology trends and workplace adoption

	Split %
More f2f video	12%
Omni channel use for support	21%
Good, smart self service	18%
Real time messaging vs email	21%
Personalised content via predictive/AI	9%
Social media for customer service	11%
Augmented reality for customer service	8%
Total	100%

Table 39: Gen Z summary for technology trends and workplace adoption

	Split %
More f2f video	7%
Omni channel use for support	28%
Good, smart self service	30%
Real time messaging vs email	11%
Personalised content via predictive/AI	10%
Social media for customer service	10%
Augmented reality for customer service	4%
Total	100%

Table 40: Gen Y summary for technology trends and workplace adoption

A review of cohort country responses from indicates:

- Only UK Gen Z selected *augmented reality as a trend* (18%) while only UK (7%) and German Gen Y (5%) selected this factor.
- Variability existed between Gen Z responders, with *omni-channels, 'smart-service'* and *real-time messaging* reflecting the highest response rates and a degree of country variation:
    - 9% of UK Gen Z selected *good smart self-service,* with no response occurring for Swedish Gen Z, and a 43% selection occurring by Norwegian Gen Z. A similar selection pattern was observed by Gen Y across countries.
    - UK and Norwegian Gen Y provided a low and zero response respectively for *the use of social medi*a for customer and employee engagement, in contrast to other Gen Y country responses that ranged from 10-29%.

These observations are depicted in Tables 41-42:

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
More f2f video	11%	20%	5%	13%	14%
Omni channel use for support	18%	30%	20%	25%	14%
Good, smart self service	9%	20%	35%	0%	43%
Real time messaging vs email	22%	15%	20%	25%	29%
Personalised content via predictive/AI	16%	5%	5%	0%	0%
Social media for customer service	7%	10%	15%	38%	0%
Augmented reality for customer service	18%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%

Table 41: Gen Z technology trends and workplace adoption by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
More f2f video	7%	0%	5%	14%	13%
Omni channel use for support	29%	40%	20%	14%	13%
Good, smart self service	31%	25%	35%	29%	25%
Real time messaging vs email	7%	5%	25%	14%	50%
Personalised content via predictive/AI	18%	10%	0%	0%	0%
Social media for customer service	2%	20%	10%	29%	0%
Augmented reality for customer service	7%	0%	5%	0%	0%
Total	100%	100%	100%	100%	100%

Table 42: Gen Y technology trends and workplace adoption by country

A high degree of congruence exists between workplace adoption trends selected by Gen Y and Gen Z, with some country variation reflecting cultural and other factors, but this is not believed to be significant in denoting the results as country-specific. UK cohort responses for both Gen Y and Gen Z including a preference for AI/augmented reality, reflecting its leading digitalised position amongst European countries for the development and uptake of advanced digital technologies.[78]

Q10 If you could identify only one technology element your organisation could improve/should have, what would it be?

The most widely cited technology element for amplified organisational adoption was *increased automation*, followed by a closely clustered group comprised of *greater cloud adoption and collaboration*, *greater IoT device adoption, virtual onboarding* and *enhanced Bot/AI. Workflow tools* and *digital in-house activities* were not selected with a higher priority, as depicted in Table 43. Tables 44-45 depict contrasts between Gen Y and Gen Z: four times as many Gen Z selected *Bots and AI;* four times more Gen Y selected *workflow tools*; half as many Gen Z selected *greater cloud adoption and tools*. This is congruent with results on cohort digital behaviour: "Young people born in the era of virtual reality are characterised by a significant transformation of their values, lifestyles and skills. Digitalisation is one of the most significant factors characterising the process of information perception."[79] This research supports this conclusion with a number of key observations:

- Gen Z prefers 'immediate' engagement manifested in a preference for Bots and AI.[80]

[78] Measured across 125+ data point indicators (spanning six pillars of talent, innovation and commercial ventures, infrastructure, research, operating environment, and development). These technologies have been defined as underpinning the next phase of digital transformation, with survey results in: Digital Future Index: 2020-2021. Digital Catapult.https://www.digicatapult.org.uk/wp-content/uploads/2021/11/Digital_Future_Index_2021_2022_-_Digital_Catapult.pdf

[79] Vinichenko, M., Nikiporets-Takigawa, N., Oseev, A., Rybakova, M., Makushkin, A. (2022). Trust of the Generation Z in Artificial Intelligence in the Assessment of Historical Events. International Journal of Early Childhood Special Education (INT-JECSE); V14(1): pp: 326-334. DOI:10.9756/INT-JECSE/V14I1.221040: p327.

[80] Ibid.

- Gen Z has limited workplace experience and as a result, a narrower engagement with technology in the workplace including legacy systems and the hierarchical and often static nature of MI and processes in the organisation, with this cohort's experience and expectations pivots around smartphones, social-media, and instant messaging.[81]
- A wider age range of work experience for Gen Y than Gen Z and for many, a pre and post smartphone recollection that encompasses the use and beta trials associated with new workplace technology transformations.[82]

	Split %
More cloud adoption and cloud tools	15%
Cloud based collaboration	12%
Increasing automation	21%
Digital in-house engagement	7%
Greater IoT devices	16%
Workflow tools	5%
Virtual onboarding, HR, queries	11%
Bots, AI and self service	15%
Total	100%

Table 43: Cohort summary for technology improvement/adoption the workplace

	Split %
More cloud adoption and cloud tools	9%
Cloud based collaboration	14%
Increasing automation	21%
Digital in-house engagement	8%
Greater IoT devices	13%
Workflow tools	2%
Virtual onboarding, HR, queries	10%
Bots, AI and self service	23%
Total	100%

Table 44: Gen Z summary for technology improvement/adoption the workplace

	Split %
More cloud adoption and cloud tools	20%
Cloud based collaboration	10%
Increasing automation	20%
Digital in-house engagement	5%
Greater IoT devices	19%
Workflow tools	8%
Virtual onboarding, HR, queries	12%
Bots, AI and self service	6%
Total	100%

Table 45: Gen Y summary for technology improvement/adoption the workplace

Minor variations were observed between country responses, with these primarily due to the interpretation of the question: Norwegian cohorts utilised *increasing automation* to include *workflow, virtual onboarding* and *cloud tools* considerations, resulting in a zero selection for these. The theme of *virtual onboarding* and *HR engagement* was of interest to Gen Z who believed it should be an integral enhancement to workplace engagement. Tables 46-47 depict the country results by cohort:

[81]Grenčíková, A.,and Vojtovič, S. (2017). Relationship of generations X, Y, Z with new communication technologies. Problems and Perspectives in Management. V15(2-3); pp:557-563. http://doi.org/10.21511/ppm.15(si).2017.09

[82] Joshi, H. (2020). Perception and Adoption of Customer Service Chatbots among Millennials: An Empirical Validation in the Indian Context. Proceedings of the 17th International Conference on Web Information Systems and Technologies. Pp: 197-208. DOI: 10.5220/0010718400003058

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
More cloud adoption and cloud tools	11%	5%	5%	25%	0%
Cloud based collaboration	7%	25%	20%	0%	29%
Increasing automation	13%	35%	20%	13%	43%
Digital in-house engagement	13%	0%	5%	13%	0%
Greater IoT devices	13%	10%	20%	0%	14%
Workflow tools	0%	0%	5%	0%	14%
Virtual onboarding, HR, queries	13%	5%	10%	13%	0%
Bots, AI and self service	29%	20%	15%	38%	0%
Total	100%	100%	100%	100%	100%

Table 46: Gen Z summary for technology improvement/adoption the workplace by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
More cloud adoption and cloud tools	29%	15%	15%	0%	13%
Cloud based collaboration	9%	0%	20%	14%	13%
Increasing automation	16%	5%	25%	57%	38%
Digital in-house engagement	4%	10%	5%	0%	0%
Greater IoT devices	16%	35%	15%	14%	13%
Workflow tools	11%	15%	0%	0%	0%
Virtual onboarding, HR, queries	16%	20%	0%	14%	0%
Bots, AI and self service	0%	0%	20%	0%	25%
Total	100%	100%	100%	100%	100%

Table 47: Gen Y summary for technology improvement/adoption the workplace by country

Brand Engagement (Non-Work)

Q 11 What is the primary way that you interact with a brand?

The most prevalent mode of brand engagement was *social media*, with the top three cited engagement modes all utilising this option: one-third of the sample *followed a brand utilising social media;* 20% *used social media to search for other brands*, and 18% *used social media for queries with a brand*. *Live chat* was the highest utilised non-social media mode of contact (12%). The remaining engagement modes were distributed between *online searching, live chat* and *phone calls*. Marked variations emerged in preferences between Gen Y and Gen Z: three times as many Gen Z utilised *social media to engage with their brand*, and around 40% more Gen Z utilised *social media* to search for other brands. No Gen Z utilised *email* or *calls* to engage with their brands, in contrast to Gen Y. Twice the number of Gen Y utilised *live chat* as an engagement mode, with Tables 48-50 depicting the results:

	Split %
Use social media for queries	18%
Follow the brand on social media	32%
Use social media to search for other/new brands	20%
Online searching	8%
Live chat	12%
Send an email	7%
Call	5%
Total	100%

Table 48: Cohort summary for primary brand interaction mode

	Split %
Use social media for queries	26%
Follow the brand on social media	40%

Use social media to search for other/new brands	22%
Online searching	6%
Live chat	6%
Send an email	0%
Call	0%
Total	100%

Table 49: Gen Z summary for primary brand interaction mode

	Split %
Use social media for queries	9%
Follow the brand on social media	24%
Use social media to search for other/new brands	17%
Online searching	9%
Live chat	18%
Send an email	14%
Call	9%
Total	100%

Table 50: Gen Y summary for primary brand interaction mode

A degree of variation was observed in the results between countries as depicted in Tables 51-52:

- Nordic and German Gen Z displayed a significantly higher preference in the use of *social media* for queries than the Gen Z in the UK and France. This trend was evident only in Nordic Gen Y, in marked contrast to the lower preference for *social media* as an engagement mode amongst Gen Y in other countries.
- UK and German Gen Z reflected a high preference for brand engagement through *follow a brand on social media,* resulting in a high response (42% and 55% respectively) and a corresponding lower response for the *use of social media to generate queries with a brand*.
- Gen Y depicted a relatively similar cross-country distribution of preferences for utilising a *call* to engage with a brand, versus zero Gen Z responses for this mode or the use of *email*. UK Gen Y depicted the highest use of *email* (24%) with Norway (13%), France and Germany (5% each) Sweden (0%) lower. This reflects the perception in the UK by Gen Y that emailing is still a digitally acceptable mode of brand engagement and is not a 'legacy technology'.[83]

	UK Gen Z	**FR Gen Z**	**GER Gen Z**	**SW Gen Z**	**NRW Gen Z**
Use social media for queries	16%	40%	15%	50%	57%
Follow the brand on social media	42%	30%	55%	25%	29%
Use social media to search for other/new brands	24%	25%	20%	13%	14%
Online searching	11%	0%	5%	0%	0%
Live chat	7%	5%	5%	13%	0%
Send an email	0%	0%	0%	0%	0%
Call	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%

Table 51: Cohort summary for primary brand interaction mode

	UK Gen Y	**FR Gen Y**	**GER Gen Y**	**SW Gen Y**	**NRW Gen Y**
Use social media for queries	4%	5%	10%	14%	38%
Follow the brand on social media	16%	35%	30%	29%	25%

[83]Ranjeet, M, and Nakshatres, K. (2015). A Study of Emerging Trends in Brand Engagement through Digital Marketing. Journal of Marketing & Communication. V(11)2; pp: p39-45.

Use social media to search for other/new brands	18%	15%	20%	29%	0%
Online searching	13%	5%	10%	0%	0%
Live chat	18%	25%	15%	14%	13%
Send an email	24%	5%	5%	0%	13%
Call	7%	10%	10%	14%	13%
Total	100%	100%	100%	100%	100%

Table 52: Cohort summary for primary brand interaction mode

Q12 What factors help to convert your interest with a brand to a purchase?

The most frequently cited average influencing factors for purchase conversion with a brand were *customer reviews* (32%) and *influencer feedback* (30%). *Word-of-mouth* followed these (23%), and was also followed by *endorsement-influence* (10%) and *online ads* (6%). Twice as many Gen Z responders cited *influencers* as their key factor while twice as many Gen Y responders cited *customer reviews* as their key influencing factor. *Online ads* had a negligible influence on Gen Z compared to Gen Y, with the results depicted in Tables 53-55, depicting the comparable responses between Gen Y and Gen Z:

	Split %
Word of mouth	23%
Customer reviews	32%
Online ads	6%
Influencer or someone followed	30%
Endorsements	10%
Total	100%

Table 53: Cohort summary for factors facilitating brand purchases

	Split %
Word of mouth	24%
Customer reviews	20%
Online ads	2%
Influencer or someone followed	42%
Endorsements	12%
Total	100%

Table 54: Gen Z summary for factors facilitating brand purchases

	Split %
Word of mouth	22%
Customer reviews	44%
Online ads	10%
Influencer or someone followed	17%
Endorsements	7%
Total	100%

Table 55: Gen Y summary for primary brand interaction mode

The results are congruent with research that reveals a number of trends:

- Younger cohorts such as digitally native Gen Z and younger Gen Y are most often persuaded to make a purchase via social media with influencers one of the most significant factors,[84] resulting in as high as 80% making a purchase based on an influencer recommendation.[85]

[84] Hu, X., Chen, X., and Davison, R. M. (2019). Social support, source credibility, social influence, and impulsive purchase behavior in social commerce. International Journal of Electronic Commerce. V(23)3; pp: 297–327. https://doi.org/10.1080/10864415.2019.1619905

[85] https://sproutsocial.com/insights/social-media-use-by-generation-en_gb/

- Older cohorts including some Gen Y undertake a multi-channel analysis of information before making a purchase decision, in contrast to faster single-channel decisions by Gen Z.[86]
- Younger digitally-native cohorts can be more 'sceptical' of online advertising and focus on what they perceive to be 'trusted' sources, with research indicating, "influencer marketing also benefits from the fact that people lose confidence in advertising, which is manifested for example by clicking less on banners or skipping advertising videos….distrust rule(s) the youngest category-Generation Z. In the Y generation there (is) the greatest positive tendency towards confidence in traditional advertising."[87]

Cohort results by country are congruent with these observations and depicted in Tables 56-57:

- A negligible number of UK Gen Z indicated any influence from *online ads* (4%) with the overall results congruent with this factor not being significant for this cohort. Younger Gen Y responders also reflected this view with Sweden and Norway not registering any response, indicating that in these countries, a greater degree of alignment s likely to be occurring with influencing factors observed in Gen Z in other countries.[88]
- *Endorsements* do not feature significantly for Gen Y in contrast to Gen Z, with the latter increased its reliance on this over time, with some Gen Z viewing endorsements in a similar manner to influencer marketing and often, these are intertwined.[89]

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Word of mouth	24%	30%	20%	25%	14%
Customer reviews	22%	35%	10%	13%	0%
Online ads	4%	0%	0%	0%	0%
Influencer or someone followed	36%	30%	60%	50%	57%
Endorsements	13%	5%	10%	13%	29%
Total	100%	100%	100%	100%	100%

Table 56: Gen Z summary for primary brand interaction mode by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
Word of mouth	22%	30%	20%	14%	13%
Customer reviews	36%	35%	55%	71%	63%
Online ads	13%	10%	10%	0%	0%
Influencer or someone followed	16%	20%	15%	14%	25%
Endorsements	13%	5%	0%	0%	0%
Total	100%	100%	100%	100%	100%

Table 57: Gen Y summary for primary brand interaction mode by country

These tables highlight that some variations exist between country responses across both cohorts. Nordic country Gen Z results were grouped for *influencer*, *word of mouth* and *endorsements*. In Gen Y Nordic countries 63%-71% of responses were for *customer reviews* with older and younger Gen Y aligned. In the UK and France, under 25-year-old Gen Y aligned to Gen Z responses. These differences are fluid at present but forecast to harmonise over time.[90]

[86] Lubica,G., Majerova,J., Nadanyiova, M. (.2020). The impact of influencers on the decision-making process regarding the purchase of the brand product. Business, Management and Education; V(18)2; pp: 282-293. DOI:10.3846/bme.2020.12608

[87] Ibid, p284.

[88] Pyöriä, P., Ojala, S., Saari, T. (2017).The Millennial Generation: A New Breed of Labour? SAGE Open. V(7)1; pp: 1-14. https://doi.org/10.1177/2158244017697158

[89] Zabel, K. L., Biermeier-Hanson, B., Baltes, B. B., Early, B. (2016). Generational differences in work ethic: Fact or fiction? Journal of Business Psychology.V(32); pp: 301-315. https://doi.org/10.1007/s10869-016-9466-5

[90] Stewart, J., Oliver, E., Cravens, K., Oish S. (2017). Managing millennials: Embracing generational differences. Business Horizons. V(60)1; pp: 45-54. DOI: 10.1016/j.bushor.2016.08.011

Q13 Do you prefer visual content or text content when engaging with a brand?

The average sample results indicate that all three modes of preferred content display were relatively evenly as depicted in Table 58. At a cohort level, twice as many Gen Z (41%) indicated a preference for visual information, while around one and a half times as many Gen Y (40%) preferred written information. Both aligned in preference for a mix of options, as depicted in Tables 59-60:

	Split %
Visual	32%
Written	36%
A mix	33%
Total	100%

Table 58: Cohort summary for visual versus text content

	Split %
Visual	41%
Written	32%
A mix	27%
Total	100%

Table 59: Gen Z summary for visual versus text content

	Split %
Visual	22%
Written	40%
A mix	38%
Total	100%

Table 60: Gen Y summary for visual versus text content

These results are congruent with research that indicates:

- Younger natively digital cohorts are more likely than older cohorts to adopt non-text brand engagement modes and prefer to rapidly review visual information than text.[91]
- Visual engagement is driven by the age, with digitally native Gen Z and the lack of work experience compared to older Gen Y precipitating a stronger preference for visual content.[92]
- Gen Z welcomes change and diversity with these attributes normalised in addition to greater environmental and cause consciousness and alignment with brands and workplaces.[93]

Tables 61-62 reflect a higher preference by Gen Z for visual engagement modes except for Norwegian cohorts. In Norway, Gen Z was closely aligned with Gen Y in a preference for written information. Gen Y depicted an overall preference for written content compared to Gen Z for the UK, France, and Germany, with this lower than Gen Z in Sweden and Norway. The results indicate:

- Text-intensive websites are not preferred by either cohort, with Gen Z often utilising alternative information sources for brand engagement if visual information is not available.[94]
- Brands that provide a balance between text and visual content maximise the chance of engagement with Gen Y and Gen Z, as they can rapidly alternate between these two options.[95]

[91] Grous, A. (2017) Sky High Economics - Chapter One, Op cit; Grous, A. (2019) Sky High Economics - Chapter Three: op cit;
[92] Ibid.
[93] Malodia, S., Singh, P., Goyal, V., Senguptra, A. (2017). Measuring the impact of brand-celebrity personality congruence on purchase intention. Journal of Marketing Communications. V(22)5; pp: 493–512. https://doi.org/10.1080/13527266.2017.1322125
[94] Jegham, S., and Bouzaabia, R. (2020) Fashion influencers on Instagram: Determinants and impact of opinion leadership on female millennial followers. Journal of Consumer Behaviour. https://doi.org/10.1002/cb.2050
[95] Maier, T., Tavanti, M., Bombard, P., Gentile, M., Bradford, B. (2015). Millennial Generation Perceptions of Value-Centred Leadership Principles. Journal of Human Resources in Hospitality and Tourism. V(14)4; pp: 382-397. https://doi.org/10.1080/15332845.2015.1008386

- Attention spans for both Gen Y and Gen Z are short with some mainstream sources citing '12 and 8 seconds' respectively, but this appears to be based on narrow sources and a lack of primary research.[96] This research extends pre-pandemic work to provide topical results:[97]
    - The time that Gen Z and Gen Y spend on a website, some social media content and brands has been reducing with an average of 4 seconds and 7 seconds respectively observed for many experienced users: lower figures than commonly reported.[98]
    - Gen Y is beginning to display shorter stickiness in their online and brand engagement, aligning in this activity to Gen Z.[99]
    - The trend of shorter, visually rich content with key messages embedded continues to gain significance as the optimal mode to engender Gen Y and Gen Z engagement and maximise both a conversion to sales and a create a following.[100]

Tables 61-62 depict results by country are congruent with these observations and reported trends:

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Visual	47%	50%	20%	50%	14%
Written	24%	25%	45%	38%	57%
A mix	29%	25%	35%	13%	29%
Total	100%	100%	100%	100%	100%

Table 61: Gen Z summary for visual versus text content by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
Visual	31%	20%	10%	14%	25%
Written	40%	30%	50%	29%	50%
A mix	29%	50%	40%	57%	25%
Total	100%	100%	100%	100%	100%

Table 62: Gen Y summary for visual versus text content by country

Q14 Do you permit cookies to optimise your web experience?

Both cohorts aligned in their choice of self-selection of some cookies (39%). The major divergence in responses occurred in the rejection of cookies, with around one quarter of Gen Z rejecting all cookies, in contrast to 16% of Gen Y ejecting all cookies. Tables 63-65 depict these results:

	Split %
Reject all cookies	21%
Accept some cookies- self selected	39%
Accept all cookies	40%
Total	100%

Table 63: Cohort summary for cookie preferences

[96] Considerable online references cite an 8 and 12 second time-span with these referencing one consumer study in particular by Sparks and Honey: https://www.sparksandhoney.com/thehive/2021/10/25/understanding-the-assignment-5-things-about-gen-z-your-nonprofit-needs-to-know. A glaring lack of academic studies exists assessing attention spans. Qualitative studies highlight the preferences between Gen Y and Z with these some of these providing additional context: Giunta, C. (2017). An Emerging Awareness of Generation Z Students for Higher Education Professors. Archives of Business Research; V(5)4; pp: 90-104. DOI: https://doi.org/10.14738/abr.54.2962 . Other studies have explored this theme both in a work and leisure context with the results indicating a time-period roughly corresponding to 8-12 second range: Grous, A. (2019) Sky High Economics - Chapter Three, op cit.

[97] Grous, A. (2017) Sky High Economics - Chapter One, op cit, Grous, A. (2019) Sky High Economics Chapter Three, op cit.; LSE research: 2018-2020. Op cit, including interviews with technology providers in the UK encompassing KMPG Cloud Practice (2020) that provided trends at sector, cohort and country-level trends, and Grous, A. (2021), op cit.

[98] Ibid.

[99] Issa, T. and Isaias, P. (2016). Internet factors influencing generations Y and Z in Australia and Portugal: A practical study. Information Processing and Management. V(52)4;,pp: 592–617. https://doi.org/10.1016/j.ipm.2015.12.006

[100] Ibid.

	Split %
Reject all cookies	26%
Accept some cookies- self selected	39%
Accept all cookies	35%
Total	100%

Table 64: Gen Z summary for cookie preferences

	Split %
Reject all cookies	16%
Accept some cookies- self selected	39%
Accept all cookies	45%
Total	100%

Table 65: Gen Y summary for cookie preferences

The results highlight divergences in the preferences between countries with almost twice as many Nordic Gen Z rejecting all cookies compared to Gen Z in other countries, in addition to displaying a low propensity to accept all cookies. In contrast, French Gen Y showed the lowest sample rejection of all cookies at 5% with key reasons provided encompassing the 'frustration' and the time taken to self-select cookies individually to reject, versus a 'reject all' option; the frequent use of cache and cookie clearing and a belief that GDPR regulations had made it more difficult for companies to misuse their data. The corollary of this was the high proportion of French Gen Y who accept all cookies - the highest in the sample at 75%. At an overarching level, the observed results indicate that despite some in-country variations, younger cohorts are less likely to accept all cookies and more likely to reject all of them. Cultural factors are also likely to influence Swedish and Nordic cohorts including the population exhibiting a strong sense of personal responsibility which is reflected in stronger personal norms when compared to other European countries.[101] The issue of privacy, data submission and use will continue to be one of the most significant evolving factors for online activities in Europe, impacting website design, use, third parties, with research highlighting the influence that cohort age and digital maturity has on online privacy: "this difference in acquaintance with online search engines and privacy is expected to be an important factor in differences between the age classes."[102] Tables 66-67 depict the country results:

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Reject all cookies	20%	25%	20%	50%	57%
Accept some cookies- self selected	53%	20%	35%	25%	29%
Accept all cookies	27%	55%	45%	25%	14%
Total	100%	100%	100%	100%	100%

Table 66: Gen Z summary for cookie preferences by country

	UK M	FR M	GER M	SW M	NRW M
Reject all cookies	16%	5%	20%	29%	25%
Accept some cookies- self selected	49%	20%	40%	29%	38%
Accept all cookies	36%	75%	40%	43%	38%
Total	100%	100%	100%	100%	100%

Table 67: Gen Y summary for cookie preferences by country

[101] Gómez-Román, C., et al. (2021). Testing Common Knowledge: Are Northern Europeans and Millennials More Concerned about the Environment? Sustainability. V(13)1; pp: 1-16; DOI:10.3390/su13010045

[102] D. Kuperus. (2016). Security and privacy perceptions of millennials vs non-millennials in digital environments. Computer Science; p7 https://www.semanticscholar.org/paper/Security-and-privacy-perceptions-of-millennials-vs-Kuperus/840d088077bca273224db9c196ec4f9c8084ee99

Q15 What is your primary purchase technology mode?

Around 60% of cohorts across the sample utilised their smartphones to make purchases, followed by laptops and tablets. Almost no cohorts purchased over the telephone, as indicated in Table 68. These preferences were consistent for both Gen Y and Gen Z as highlighted in Tables 69-70:

	Split %
Smartphone	59%
Online via computer/tablet	41%
Telephone	1%
Total	100%

Table 68: Cohort summary for purchase technology mode

	Split %
Smartphone	60%
Online via computer/tablet	40%
Telephone	0%
Total	100%

Table 69: Gen Z summary for purchase technology mode

	Split %
Smartphone	57%
Online via computer/tablet	42%
Telephone	1%
Total	100%

Table 70: Gen Y summary for purchase technology mode

Norwegian and Swedish Gen Z indicated the highest preference for using smartphones for purchases (86-88%). Gen Y also aligned with the same Gen Z preference rates from their respective countries with the exception of Norway and Sweden. This trend potentially warrants additional research to explore the finding. It is possible that other country Gen Z will play 'catch-up' with the Nordic countries for this factor or that it is something that along with the majority of other divergences observed, is likely to align over time. Tables 71-72 summarise these results:

	UK Gen Z	**FR Gen Z**	**GER Gen Z**	**SW Gen Z**	**NRW Gen Z**
Smartphone	56%	55%	55%	88%	86%
Online via computer/tablet	44%	45%	45%	13%	14%
Telephone	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%

Table 71: Gen Z summary for purchase technology mode by country

	UK Gen Y	**FR Gen Y**	**GER Gen Y**	**SW Gen Y**	**NRW Gen Y**
Smartphone	58%	55%	50%	57%	75%
Online via computer/tablet	40%	45%	50%	43%	25%
Telephone	2%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%

Table 72: Gen Y summary for purchase technology mode by country

Q16 What frustrates you when interacting with a brand's website?

The two most cited frustrations in brand engagement are *excessive text* and *lack of visual content* (31%), accounting for 60% of responses, marginally ahead of *a site that was not optimised for mobiles* (27%). This is followed by a clustering of five factors with each accounting for 5-12% of responses as depicted in average sample responses in Table 73, followed by cohort responses in Tables 74-75:

	Split %
Too much text & lack of visual content	31%
Hard to find information	9%
Uninteresting content and offers	5%
Lack of customised content	10%
Slow website	12%
Lack of instant contact options	8%
Not optimised for mobiles	27%
Total	100%

Table 73: Cohort summary for brand frustrations

	Split %
Too much text & lack of visual content	30%
Hard to find information	9%
Uninteresting content and offers	1%
Lack of customised content	6%
Slow website	13%
Lack of instant contact options	7%
Not optimised for mobiles	34%
Total	100%

Table 74: Gen Z summary for brand frustrations

	Split %
Too much text & lack of visual content	31%
Hard to find information	9%
Uninteresting content and offers	8%
Lack of customised content	13%
Slow website	11%
Lack of instant contact options	9%
Not optimised for mobiles	19%
Total	100%

Table 75: Gen Y summary for brand frustrations

This research highlights a number of findings that are congruent with broader research:

- Both Gen Y and Gen Z expect 'richer' but succinct content from their brands.[103]
- The use of social media for brand engagement and wider use accelerated during the pandemic to the point of being as ubiquitous as other information sources. [104]
- 'Less is more' is a key a content preference for Gen Y and Gen Z and their continuously shortening attention span in online activities and brand and social media engagement. These reflect other research findings: "Headlines that do not provide a summary of the content in a clear and concise manner can reduce the urge to read. It's clear that the internet users of today have a short attention span, access to many online channels which inundate them with information, requiring organisations to be upfront about the content they are publishing in attempts to pull the customer towards them." [105]
- The lack of an optimised website for mobiles yields the shortest engagement time with a brand or website of any negative factor, with over 90% of Gen Z indicating an almost

[103] Constantinos-Vasilios, P., Stylos, N., Fotiadis, A. (2017). Generation Z consumers' expectations of interactions in smart retailing: A future agenda. Computers in Human Behavior. V(77)' pp:372-381,. https://doi.org/10.1016/j.chb.2017.01.058

[104] Štrbová, E., and Boldišová, S. (2021). Generation Y Preferences in Online Content Consumption: Content Marketing Implications for the Arts. Social Communication. V(7)1: pp:1-17. DOI: https://doi.org/10.2478/sc-2021-0001

[105] Douglas, O.G., and Pracejus, J.W. (2020). Customized advertising: Allowing consumers to directly tailor messages leads to better outcomes for the brand. Journal of Business Research. V(116); pp: 245–257. doi:10.1016/j.jbusres.2020.04.054.

immediate exit when this occurs. This has not emerged as strongly for Gen Y but is likely to harmonise with Gen Z: currently, Gen Y has a higher tolerance than Gen Z for slow websites.

- Both cohorts often utilise alternative information sources where they wish to engage with a brand but are frustrated with the primary sources visited such as the brand's social media presence or its website.[106]
- The lack of customised content was a higher ranked brand frustration for Gen Y than Gen Z, with this result skewed by older Gen Y.[107]

Tables 76-77 depict the cohort country results. Gen Z was broadly aligned in the selection of frustrations between countries, with the exception of Norwegian and Swedish responses that were polarised: Norwegian Gen Z only selected three negative factors (*excessive text, slow website, non-mobile optimisation*) while Swedish Gen Z selected these three and a further factor: *a lack of readily accessible contact information*. Other country results reflected congruence around the primary factors of *excessive text, a lack of mobile optimisation* and *difficult to find information* with some variations observed between other responses. Gen Y displayed a marginally greater variation between these three negative factors across countries and a larger variation in responses for the remaining factors. UK Gen Y is the only country recipient to select *hard to find information*. Half as many UK and Swedish Gen Y selected *a lack of mobile optimisation* than Gen Y from the other three countries.

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Too much text & lack of visual content	31%	30%	25%	38%	29%
Hard to find information	2%	15%	20%	13%	0%
Uninteresting content and offers	0%	5%	0%	0%	0%
Lack of customised content	7%	5%	5%	13%	0%
Slow website	16%	10%	10%	0%	29%
Lack of instant contact options	11%	0%	10%	0%	0%
Not optimised for mobiles	33%	35%	30%	38%	43%
Total	100%	100%	100%	100%	100%

Table 76: Gen Z summary for brand frustrations by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
Too much text & lack of visual content	33%	30%	20%	43%	38%
Hard to find information	20%	0%	0%	0%	0%
Uninteresting content and offers	11%	5%	5%	14%	0%
Lack of customised content	9%	15%	15%	14%	25%
Slow website	11%	5%	15%	14%	13%
Lack of instant contact options	4%	15%	20%	0%	0%
Not optimised for mobiles	11%	30%	25%	14%	25%
Total	100%	100%	100%	100%	100%

Table 77: Gen Y Cohort summary for brand frustrations by country

Q17 What contact mode do you prefer for brand engagement?

Approximately half of the sample utilised *social media* on average to engage with their brands. The second average preference was the use of *WhatsApp*, followed by the use of *live chat*. *The telephone* and *contact forms* were not selected by any responders with *email* only receiving a negligible average response. These responses are summarised in Table 78. The major variations between Gen Z and Gen Y include a greater preference for *live chat* by Gen Y, followed marginally by *WhatsApp* and *social*

[106] LSE research: 2018-2020. Op cit, and, Grous, A. (2017) Sky High Economics - Chapter One, op cit, and: Grous, A. (2019) Sky High Economics - Chapter Three:, op cit.

[107] Wong, A., Ho, S, Olusanya O., Antonini M., Lyness, D. (2021) The use of social media and online communications in times of pandemic COVID-19. Journal of the Intensive Care Society. V(22)3; pp: 255-260. doi:10.1177/1751143720966280

media. In contrast, Gen Z depicts a greater preference for *social media* followed by *WhatsApp*. Gen Y indicated that the use of *email* was to confirm orders, query them, action refunds, in contrast to using this mode for communication. Tables 79-80 depict the two cohort responses:

	Split %
Live chat	21%
WhatsApp	30%
Social Media including DM	34%
Email	9%
Phone	5%
Contact forms	2%
Total	100%

Table 78: Cohort preferred contact mode for brand engagement

	Split %
Live chat	15%
WhatsApp	39%
Social Media including DM	45%
Email	1%
Phone	0%
Contact forms	0%
Total	100%

Table 79: Gen Z preferred contact mode for brand engagement

	Split %
Live chat	27%
WhatsApp	21%
Social Media including DM	23%
Email	16%
Phone	10%
Contact forms	3%
Total	100%

Table 80: Gen Y preferred contact mode for brand engagement

Cohort responses reflected mixed preferences. The non-averaged responses indicate that Gen Z overwhelmingly prefer both *WhatsApp* and *social media* as their primary engagement modes with brands, with *live chat* rated third. *Email*, *contact forms* or *telephone* were not selected by almost every responder. Minor variations between country responses are not believed to be significant.[108] Gen Y in Sweden and Norway depict a closer alignment in preferences to Gen Z including the use of *social media.* Norwegian and Swedish Gen Y display similar preferences to Gen Z, including a zero-response rate for the use of *email, phone* and *contact forms* by Gen Y in these countries, versus the use of these by the same cohorts in the other three countries. Tables 81-82 depict these results:

	UK Gen Z	**FR Gen Z**	**GER Gen Z**	**SW Gen Z**	**NRW Gen Z**
Live chat	16%	10%	15%	25%	14%
WhatsApp	33%	35%	60%	38%	29%
Social Media including DM	51%	55%	20%	38%	57%

[108] Grous, A. (2017) Sky High Economics - Chapter One, op cit, Grous, A. (2019) Sky High Economics Chapter Three, op cit. ; LSE research: 2018-2020. Op cit, including interviews with technology providers in the UK that provided trends at sector, cohort and country-level trends.

Email	0%	0%	5%	0%	0%
Phone	0%	0%	0%	0%	0%
Contact forms	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%

Table 81 Gen Y preferred contact mode for brand engagement

	UK Gen Y	**FR Gen Y**	**GER Gen Y**	**SW Gen Y**	**NRW Gen Y**
Live chat	24%	35%	30%	29%	13%
WhatsApp	22%	15%	15%	29%	38%
Social Media including DM	22%	15%	15%	43%	50%
Email	18%	15%	25%	0%	0%
Phone	13%	15%	5%	0%	0%
Contact forms	0%	5%	10%	0%	0%
Total	100%	100%	100%	100%	100%

Table 82 Gen Y preferred contact mode for brand engagement

Q18 How important is video and interactive content in brand engagement?

Video and interactive content was defined as 'Important' to 'Extremely Important' by the sample as depicted in Table 83. Three times as many Gen Z depicted this factor as 'Important', with 28% more rating this 'Very Important. In contrast, 8% more Gen Y responders indicated a higher preference for 'Important'' than Gen Z. Gen Z depicted a concentration of the most significant response for 'Extremely Important', reducing by over 50% for the second most significant, while Gen Y's responses were distributed with a similar preference rate across the highest three as depicted in Tables 84-85:

	Split %
Extremely important	50%
Very important	32%
Important	17%
Not important	1%
Total	100%

Table 83: Cohort importance of video and interactive content

	Split %
Extremely important	64%
Very important	28%
Important	8%
Not important	0%
Total	100%

Table 84: Gen Z importance of video and interactive content

	Split %
Extremely important	36%
Very important	36%
Important	25%
Not important	3%
Total	100%

Table 85: Gen Y importance of video and interactive content

The results depict a preference for *video* and *interactive content* and are congruent with findings on how Gen Y and Gen Z interact with brands and websites:

- Gen Z prefers social media for most of their shopping, news, information, and other sources of daily digital consumption and the 'instant gratification' from video and interactive content

such as Snapchat, Instagram, YouTube, TikTok and WhatsApp, in contrast to Gen Y that utilises Facebook, WhatsApp, twitter, and a lower degree on other apps.[109][110]

- Gen Z trusts peer endorsements and social media content to a greater degree than Gen Y with this reflected in preference for interactive content versus the requirement to review and assess greater content through text and multiple links to additional content. This 'trust factor' is reflected by Gen Z preference for influencer endorsements and 'trusted brands' that are followed, with a greater degree of Gen Y than Gen Z undertaking additional research or seeking alternative sources of brand and content verification.[111]
- Visual purchase references continue to gain importance for Gen Z and for younger Gen Y.[112]

Tables 86-87 depicts the country cohort comparison in responses. These indicate the polarised rankings observed for Norwegian and Swedish Gen Z, with 100% of their responses segmented between the two highest categories of importance. A high degree of alignment was observed between country responses for Gen Z. Gen Y UK and French provide a response rate that is twice as high as the German response, and higher than Swedish and Norwegian Gen Y. The lack of any score by Gen Y respondents in Norway (13%) reflected a perception that that interactive content and video were equal to other information modes such as text, and did not require the ranking of one over the other:

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Extremely important	64%	60%	65%	75%	57%
Very important	24%	35%	25%	25%	43%
Important	11%	5%	10%	0%	0%
Not important	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%

Table 86: Gen Z importance of video and interactive content by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
Extremely important	42%	45%	20%	29%	25%
Very important	36%	40%	30%	43%	38%
Important	22%	15%	40%	29%	25%
Not important	0%	0%	10%	0%	13%
Total	100%	100%	100%	100%	100%

Table 87: Gen Y importance of video and interactive content by country

Q19 When engaging with a brand what is the most important attribute that you look for?

Both Gen Z and Gen Y are aligned in their preferences, with the three highest ranked responses from high to low encompassing *trust and authenticity, personalisation,* and *quality*. *Diversity and Inclusion* received 2% of the responses for Gen Z and 6% for Gen Y indicating a three-fold higher response rate by the latter. Gen Y is often more mobilised than Gen Z in supporting social causes through greater experience both in and out of the workforce. Gen Z social activism reflects formative first-stage

[109] Mahapatra, S. (2017). Mobile shopping among young consumers: An empirical study in an emerging market. International Journal of Retail Distribution Management; V(45)9; pp: 930-949. https://doi.org/10.1108/IJRDM-08-2016-0128

[110] Boateng, H., and Okoe, A. (2015). Consumers' attitude towards social media advertising and their behavioural response. Journal of Research in Interactive Marketing V(9); pp: 299–312. DOI:10.1108/JRIM-01-2015-0012

[111] Venkateswararao P., Kanagala, A., Poojitha, S. (2020). The Impact of Online Content and Interactions on Generation Z Consumers. International Journal of Advanced Science and Technology. V(29)5; pp: 4762-4770. http://sersc.org/journals/index.php/IJAST/article/view/13861

[112] Thomas, M., Kavya .V., Monica, M. (2018). Online Website Cues Influencing the Purchase Intention of Generation Z Mediated by Trust. Indian Journal of Commerce and Management Studies, Educational Research Multimedia and Publications. V(9)1; pp: 13-23. DOI: 10.18843/ijcms/v9i1/03

behaviour, subsequently progressing to engagement with others including Gen Y, and additional activities that align with beliefs.[113] Tables 88-90 depict these results:

	Split %
Trust and authenticity	35%
Quality	16%
Personalisation	30%
Values and social responsibility	16%
Diversity and inclusion	4%
Total	100%

Table 88: Cohort most important brand engagement attribute

	Split %
Trust and authenticity	32%
Quality	19%
Personalisation	27%
Values and social responsibility	20%
Diversity and inclusion	2%
Total	100%

Table 89: Gen Z most important brand engagement attribute

	Split %
Trust and authenticity	37%
Quality	13%
Personalisation	33%
Values and social responsibility	11%
Diversity and inclusion	6%
Total	100%

Table 90: Gen Y most important brand engagement attribute

The highest ranked Gen Z responses were distributed between *trust and authenticity* and *personalisation*. In contrast Gen Y ranked *trust and authenticity* as their primary preference, with the results consistent with findings that that trust is the paramount factor for this cohort when engaging with a brand.[114] A greater proportion of Gen Z than Gen Y indicated that brand *quality* and *values* and *social responsibility* were significant factors in defining a brand's attraction. This reflects the emerging 'social voice' of Gen Z[115] and an emphasis on investing in brands with higher quality: "As one of the generation with the best education, Gen Z is well aware of the price of any product they will buy. Compared to previous generations, Gen Z will be the greatest challenge for companies, as they want to make sure they choose the finest products at the lowest possible cost, and never try to expand their search to unknown brands."[116] Tables 90-91 depict the country results:

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Trust and authenticity	36%	30%	30%	25%	29%
Quality	18%	20%	20%	25%	14%
Personalisation	20%	25%	35%	38%	43%

[113] Hyllegard, K., Yan,R.m, Ogle, J., Attmann, J. (2010) The influence of gender, social cause, charitable support, and message appeal on Gen Y's responses to cause-related marketing Journal of Marketing Management,. V(27)1-2; pp: 100-123, DOI: 10.1080/02672571003683755

[114] Mingione , M., and Pattuglia, S. (2017). Towards a new understanding of brand authenticity: seeing through the lens of millennials. Sinergie: Italian Journal of Management. V(35); pp: 35-55. DOI: https://doi.org/10.7433/s103.2017.03

[115] Jasmina, I., and Webster, C. (2014). Investigating Consumer-Brand Relational Authenticity. Journal of Brand Management. V(21)4; pp: 342-363, DOI: 10.1057/bm.2014.11

[116] Ayuni, R.F., (2019) The online shopping habits and e-loyalty of Gen Z as natives in the digital era. Journal of Indonesian Economy and Business. V(34)2; pp:168-184; p167. https://doi.org/10.22146/jieb.39848

Values and social responsibility	24%	20%	15%	13%	14%
Diversity and inclusion	2%	5%	0%	0%	0%
Total	100%	100%	100%	100%	100%

Table 90: Gen Z most important brand engagement attribute by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
Trust and authenticity	42%	35%	35%	14%	38%
Quality	11%	15%	15%	14%	13%
Personalisation	31%	30%	40%	29%	38%
Values and social responsibility	11%	10%	10%	29%	0%
Diversity and inclusion	4%	10%	0%	14%	13%
Total	100%	100%	100%	100%	100%

Table 91: Gen Y most important brand engagement attribute by country

Q20 What is most important to you when seeking assistance from a brand?

Despite a lack of work experience, Gen Z continues to propagate strong expectations, both in and out of the workplace, with external views formed by social media and online activities.[117] Table 92 summarises the average results indicating that the sample was distributed between two responses: seeking *immediate resolution of queries* and *undertaking self-service* for assistance. *Personalised assistance* and *first-time resolution of issues* were ranked with a similar importance but with a lower preference than these two factors. Twice as many Gen Y believe that a *personalised response* is important, congruent with this cohort's expectation for expedient engagement and query resolution.[118] Tables 93-94 summarise the responses:

	Split %
Immediate resolution: BOT and/or live	31%
Self-service: with or without live	32%
Personalised response: immediate or lagged	20%
First-time resolution for any issue	17%
Total	100%

Table 92: Average cohort response for the important factor when seeking assistance from a brand

	Split %
Immediate resolution: BOT and/or live	36%
Self-service: with or without live	32%
Personalised response: immediate or lagged	15%
First-time resolution for any issue	17%
Total	100%

Table 93: Gen Z most important factor when seeking assistance from a brand

	Split %
Immediate resolution: BOT and/or live	26%
Self-service: with or without live chat	32%
Personalised response: immediate or lagged	25%
First-time resolution for any issue	17%
Total	100%

Table 94: Gen Y most important factor when seeking assistance from a brand

Country results across indicate that Gen Z prioritised *immediate resolution of queries* marginally higher than *self-service*, while Gen Y displayed a greater variation in responses. The greatest variation between countries was by Gen Z for *first-time resolution:* the response by French Gen Z was five times higher than the lowest response by German Gen Z and twice as high as the responses by Swedish and

[117] Ayuni, R.F., (2019), op cit.

[118] Vieira, J., Frade, R., Ascenso, R. (2020). Generation Z and Key-Factors on E-Commerce: A Study on the Portuguese Tourism Sector. Administrative Science. V(10)103; pp: 1-17. doi:10.3390/admsci10040103

Norwegian Gen Z. These responses do not appear to reflect material variations between each cohort by country with the exception of *first-time response resolution* for German Gen Z. The results for both Gen Y and Gen Z can be utilised to define remediating actions applicable across countries. Gen Z responses reflect the often cited attributes of this cohort: highly critical nature; demanding; flexible; frequent change of opinion; a high concern with environmental issues.[119] Tables 95-96 depict the country cohort responses:

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
Immediate resolution: BOT and/or live	31%	35%	45%	38%	43%
Self-service: with or without live	33%	30%	30%	38%	29%
Personalised response: immediate or lagged	16%	10%	20%	13%	14%
First-time resolution for any issue	20%	25%	5%	13%	14%
Total	100%	100%	100%	100%	100%

Table 95: Gen Z most important factor when seeking assistance from a brand by country

	JK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
Immediate resolution: BOT and/or live	27%	10%	35%	29%	38%
Self-service: with or without live chat	31%	30%	35%	43%	25%
Personalised response: immediate or lagged	29%	30%	15%	14%	25%
First-time resolution for any issue	13%	30%	15%	14%	13%
Total	100%	100%	100%	100%	100%

Table 96: Gen Y most important factor when seeking assistance from a brand by country

Q21 What is a major turn-off when engaging with a brand?

The sample average indicates that *higher prices* were rated as the most significant negative attribute in cohort engagement with a brand, receiving over twice the responses for the next highest ranked attribute of *a poor engagement experience*. All other attributes were clustered closely together in response preferences below the priority of these two factors as depicted in Table 97. Gen Z and Gen Y depicted contrasting preferences with three times as many Gen Z indicating that *higher prices* were a negative factor, while three times as many Gen Y indicated that *a poor engagement experience* was a negative factor. In addition, almost four times as many Gen Y selected *a lack of immediate contact details* and *poor values* as negative factors, as depicted in Tables 98-99:

	Split %
High prices	40%
'Poor' values	7%
Lack of transparency & authenticity	14%
Lack of immediate contact/service options	9%
Poor engagement experience	18%
Lack of short, quick content	13%
Total	100%

Table 97: Cohort major turn-off when engaging with a brand

	Split %
High prices	59%
'Poor' values	3%
Lack of transparency & authenticity	12%
Lack of immediate contact/service options	4%

[119] Vieira, J., Frade, R., Ascenso, R. (2020), op cit.

Poor engagement experience	9%
Lack of short, quick content	13%
Total	100%

Table 98: Gen Z major turn-off when engaging with a brand

	Split %
High prices	21%
'Poor' values	10%
Lack of transparency & authenticity	16%
Lack of immediate contact/service options	14%
Poor engagement experience	26%
Lack of short, quick content	13%
Total	100%

Table 99: Gen Y major turn-off when engaging with a brand

These results are congruent with research and indicate:

- Gen Z displays different consumer preferences and ideologies to many Gen Y and others.[120]
- Both *value consciousness* and *convenience* are dominant factors spurring Gen Z consumers. This is reflected in this research by their polarised responses segmented between the highest preference of *price,* accounting for around 60% of responses, and other factors ranked significantly below this and clustered in a response range of 3-12% .[121]
- A focus by Gen Z on *price* reflects a preference for online purchases and m-commerce and rapidly comparing available products before making a purchase decision, with lower brand loyal inherent in this cohort compared to Gen Y and other cohorts.[122]
- Gen Z is digitally native, used to instant access and gratification, and does not undertake extensive research before making a purchase, in contrast to older Gen Y.[123][124]

The country results indicate that German and French Gen Y ranked *high prices* as the highest negative engagement factor while UK Gen Y ranked this as the lowest negative factor. Variation was observed in Gen Z responses for the other factors between countries, but this does not permit conclusions to be drawn and these variations. The key observation from the results is that all negative elements should be deemed to be relevant and are likely to continue altering over time. The ability for cohorts to expediently contact a brand is an emerging factor of significance accelerated in importance during the pandemic.[125] Despite higher preferences for this factor by Gen Y, it is believed that it will also continue to grow in significance for Gen Z. This is reflected in results that indicate:

[120] Desai, S. P., and Lele, V. (2017). Correlating internet, social networks and workplace - a case of generation Z students. Journal of Commerce and Management Thought. V (8)4; pp: 802-815. DOI:10.5958/0976-478X.2017.00050.7

[121] Thangavel, P., Pathak, P., Chandra, B. (2019). Consumer Decision-making Style of Gen Z: A Generational Cohort Analysis. Global Business Review. pp: 1019DOI:10.1177/0972150919880128

[122] Loureiro, S., and Breazeale, M. (2016). Pressing the buy button: Generation Y's online clothing shopping orientation and its impact on purchase. Clothing and Textiles Research Journal. V (34)3; pp: 163–178. https://journals.sagepub.com/doi/abs/10.1177/0887302X16633530

[123] Kapil, Y., and Roy, A. (2017). International Journal of Social Relevance and Concern. V(2)1; pp: 10-14. https://ijournals.in/wp-content/uploads/2017/07/IJOURNAL_CAMERA_READY.pdf

[124] Grous, A. (2017) Sky High Economics - Chapter One, op cit, Grous, A. (2019) Sky High Economics Chapter Three, op cit.; LSE research: 2018-2020. Op cit, including interviews with technology providers in the UK encompassing KMPG Cloud Practice (2020) that provided trends at sector, cohort and country-level trends.

[125] Gu, S., et al (2021) Op cit.

- Online activities encompassing pre and post brand engagement have continued to become significant factors for both Gen Y and Gen Z.[126]
- Gen Z and younger Gen Y can associate negative engagement factors with a brand following their initial experience, depicting a lower propensity to re-visit the brand in the future than older Gen Y and other cohorts.[127]
- Gen Z assumes that the digitally native milieu it has grown up in along with processes to complement an 'always on' environment are widely implemented by brands including optimised mobile websites, short engagement times facilitate rapid informed shopping decisions, 'instant' communication options pre and post purchase, will be ubiquitous. A lack of these leads to frustration and can result in lost sales and negative brand perceptions [128]

Tables 100-101 depict the country results for Gen Y and Gen Z:

	UK Gen Z	FR Gen Z	GER Gen Z	SW Gen Z	NRW Gen Z
High prices	62%	55%	55%	63%	57%
'Poor' values	2%	10%	0%	0%	0%
Lack of transparency & authenticity	9%	15%	20%	13%	0%
Lack of immediate contact/service options	4%	5%	5%	0%	0%
Poor engagement experience	4%	5%	15%	13%	29%
Lack of short, quick content	18%	10%	5%	13%	14%
Total	100%	100%	100%	100%	100%

Table 100: Gen Z major turn-off when engaging with a brand by country

	UK Gen Y	FR Gen Y	GER Gen Y	SW Gen Y	NRW Gen Y
High prices	4%	35%	45%	14%	25%
'Poor' values	13%	10%	0%	14%	13%
Lack of transparency & authenticity	16%	20%	15%	0%	25%
Lack of immediate contact/service options	16%	0%	20%	14%	13%
Poor engagement experience	36%	20%	15%	14%	13%
Lack of short, quick content	16%	15%	5%	43%	13%
Total	100%	100%	100%	100%	100%

Table 101: Gen Y major turn-off when engaging with a brand by country

Q22 If a brand could do one thing to engage with you better, what would it be?

Low cost and *high quality* were the highest ranked factors for the sample when engaging with a brand, with responders indicating that if this was improved it can lead to enhanced engagement. This factor was selected by three and a half times as many responders than the next highest factors of *honesty and relevance* and *optimised faster websites.* Other factors were ranked in a cluster marginally behind these as depicted in Table 102. Both Gen Y and Gen Z selected *low cost and higher quality* as their primary improvement factor with the most observed variations evident for *honesty and relevance:* four times as many Gen Y than Gen Z selected this followed by *ethics*. In contrast, twice as many Gen Z selected *optimised, faster websites* and *pretend coolness*. Tables 103-104 depict these results:

	Split %
Honesty and relevance	15%
Low cost & high quality	42%
Ethical, socially & environmentally responsible	8%

[126] Issa, T., and Isaias, P. (2016). Internet factors influencing generations Y and Z in Australia and Portugal: A practical study. Information Processing and Management,. V(52)4; pp: 592-617. doi:10.1016/j.ipm.2015.12.006

[127] Marriott, H. R., Williams, M., Dwivedi, Y. K. (2017). What do we know about consumer m-shopping behaviour? International Journal of Retail & Distribution Management. V(45)6); pp: 568-586. doi:10.1108/ijrdm-09-2016-0164

[128] Priporas, C., Stylos, N., Fotiadis, A. (2017). Generation Z consumers' expectations of interactions in smart retailing: A future agenda. Computers in Human Behavior. V(77) Supplement C; pp: 374-381. doi.org/10.1016/j.chb.2017.01.058

Optimised, fast website and social media presence	14%
Fast instant engagement options	12%
Drop 'pretend coolness'	10%
Total	100%

Table 102: Cohort preference for one improvement factor by a brand

	Split %
Honesty and relevance	6%
Low cost & high quality	45%
Ethical, socially & environmentally responsible	5%
Optimised, fast website and social media presence	19%
Fast instant engagement options	11%
Drop 'pretend coolness'	14%
Total	100%

Table 103: Gen Z preference for one improvement factor by a brand

	Split %
Honesty and relevance	24%
Low cost & high quality	38%
Ethical, socially & environmentally responsible	11%
Optimised, fast website and social media presence	8%
Fast instant engagement options	13%
Drop 'pretend coolness'	6%
Total	100%

Table 104: Gen Y preference for one improvement factor by a brand

Sixty-two per cent of Gen Y responses are attributed to the two higher ranked factors of *honesty* and *low cost*. Gen Z in the UK, France and Germany depicted the most polarised results between these two factors, followed by a lower degree or polarisation by Swedish and Norwegian Gen Z. Gen Z did not display a high preference for the adoption of social and environmental causes, with this aligning to emerging results confirming that this attribute is not necessarily reflective of Gen Z, in contrast to claims that Gen Z undertakes a high degree of political engagement and activism.[129] This research does not support the premise that younger cohorts in Northern Europe are engaged in these activities to a greater degree than Gen Z in other countries, although they may display a higher affinity with causes than this cohort in other European countries.[130] Tables 105-106 depict the country results:

	UK Gen Z	**FR Gen Z**	**GER Gen Z**	**SW Gen Z**	**NRW Gen Z**
Honesty and relevance	4%	5%	5%	13%	14%
Low cost & high quality	42%	55%	40%	50%	43%
Ethical, socially & environmentally responsible	4%	10%	5%	0%	0%
Optimised, fast website and social media presence	20%	15%	25%	13%	14%
Fast instant engagement options	9%	5%	15%	13%	29%
Drop 'pretend coolness'	20%	10%	10%	13%	0%
Total	100%	100%	100%	100%	100%

Table 105: Gen Z preference for one improvement factor by a brand by country

	UK Gen Y	**FR Gen Y**	**GER Gen Y**	**SW Gen Y**	**NRW Gen Y**
Honesty and relevance	36%	20%	5%	14%	25%
Low cost & high quality	22%	50%	45%	43%	38%
Ethical, socially & environmentally responsible	13%	10%	10%	14%	13%
Optimised, fast website and social media presence	2%	5%	25%	14%	13%

[129] Dabija, D.C. Bejan, B. Tipi, N. (2018). Generation X versus Millennials communication behavior on social media when purchasing food versus tourist services. Ekonomie a Management. (V)21; pp: 191–205. DOI:10.15240/TUL/001/2018-1-013

[130] Valgarðsson, V. O. (2019). Differential Turnout Decline in Norway and Sweden: A Generation of Apathy or Alienation? Scandinavian Political Studies. V(42)3–4; pp: pp: 270-295. doi: 10.1111/1467-9477.12155

Fast instant engagement options	20%	5%	10%	14%	13%
Drop 'pretend coolness'	7%	10%	5%	0%	0%
Total	100%	100%	100%	100%	100%

Table 106: Gen Y preference for one improvement factor by a brand by country

The responses indicate that where divergences occur observed between countries, these are not believed to be sufficiently significant to require the segmentation of attributes by region. An example is the factor of *fast, instant engagement* that reflects variation between countries for both cohorts, with French and German Gen Z and French Gen Y rating this below 10%. In contrast, Norwegian Gen Z and UK Gen Y rate this two and three times higher in importance respectively. This is likely to continue to flux between cohorts across Europe, with cross-cohort learning and inter-country influences continuing to occur. The values, experiences and activities of gen Y and Gen Z will continue migrating to-and-from work and non-work environments, influencing social and brand activities in the process.

Additional Query: *Support – What work-related Support factors create a negative experience?*

Cohorts diverged in their ranking of work-related Support attributes that create a negative experience but were aligned in their selection between countries. On average the most defined attribute was the *lack of instant or two-way messaging*. This was followed by *long response times*, *the availability of only email addresses or contact forms, the availability only of internal intranet material* and *a lack of contact phone numbers*. These are depicted in Chart 2. Chart 3 depicts a comparison of the results between the two cohorts. Gen Z selected the *lack of two-way and instant messaging* as the highest ranked negative factor (40%), with this result 10% higher than Gen Y, who selected it as the second highest negative factor behind *long response times*. In contrast, Gen Z selected this as the second highest negative factor.

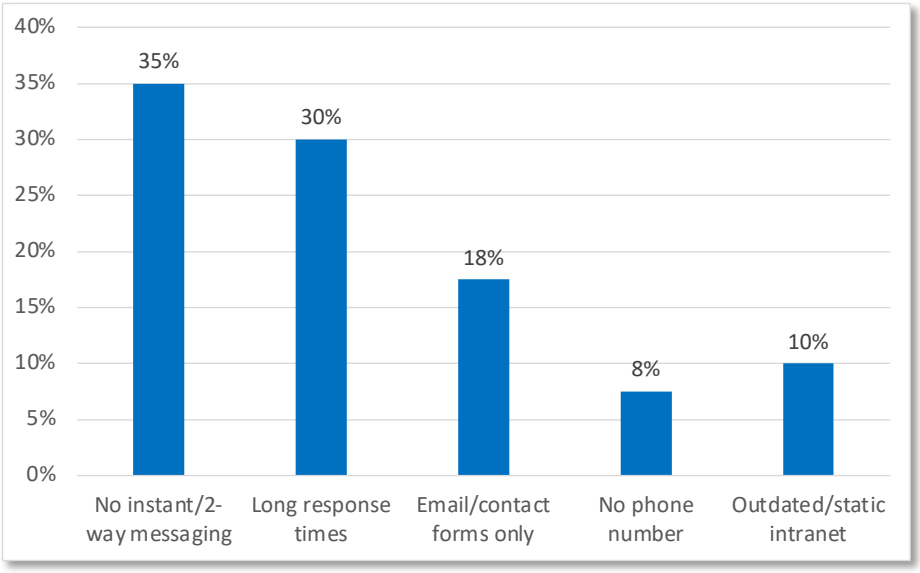

Chart 2: Average cohort responses for Support-related activities that create a negative experience

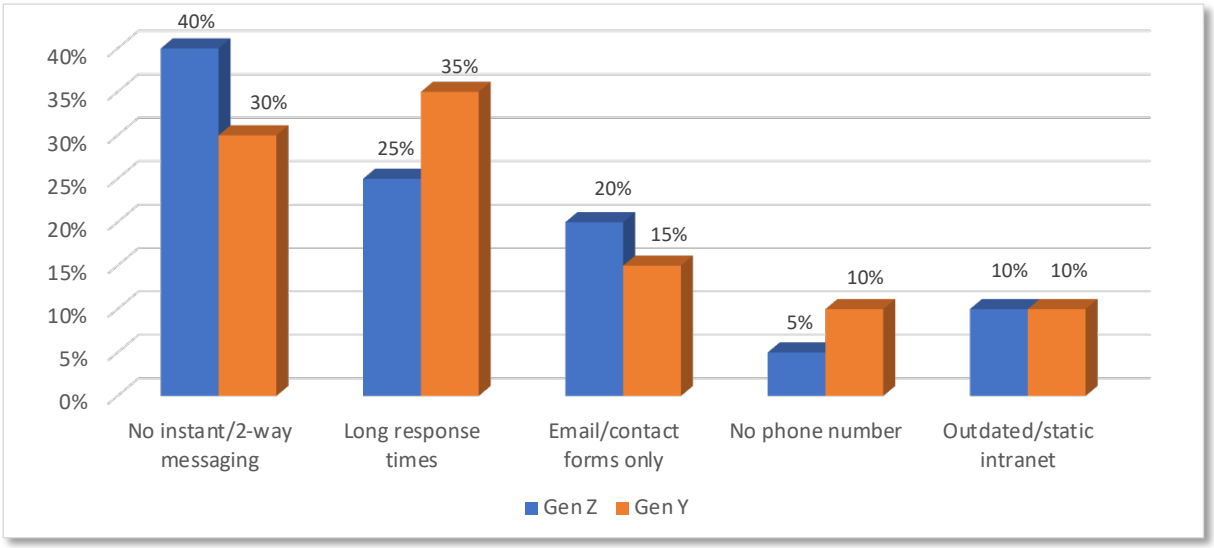

Chart 3: Gen Z and Gen Y responses defining Support-related activities that create a negative experience

Both cohorts defined *contact forms* and an *email address* as the third highest negative factor with only a 5% variation between their responses. Twice as many Gen Y as Gen Z defined the *lack of a phone number* as their fourth highest negative factor, with the final negative factor of a *reliance on static intranet pages* receiving the same response by both cohorts.

Additional Query: *Support - What is the most important workplace Support attribute?*

Workplace Support is an under-researched but emerging factor of significance for Gen Y and Gen Z.[131] The four highest average cohort responses were grouped within 3% of each other (20-24%) as depicted in Chart 4. Two responses were ranked equally highest, *experiencing the lowest possible touch points*, and *obtaining immediate or short response times to queries*, followed by *the availability of Chatbots and live-chat escalation* (21%), and *live chat* (20%). The fifth factor, *the ability to contact key areas*, achieved the lowest ranking (14%).

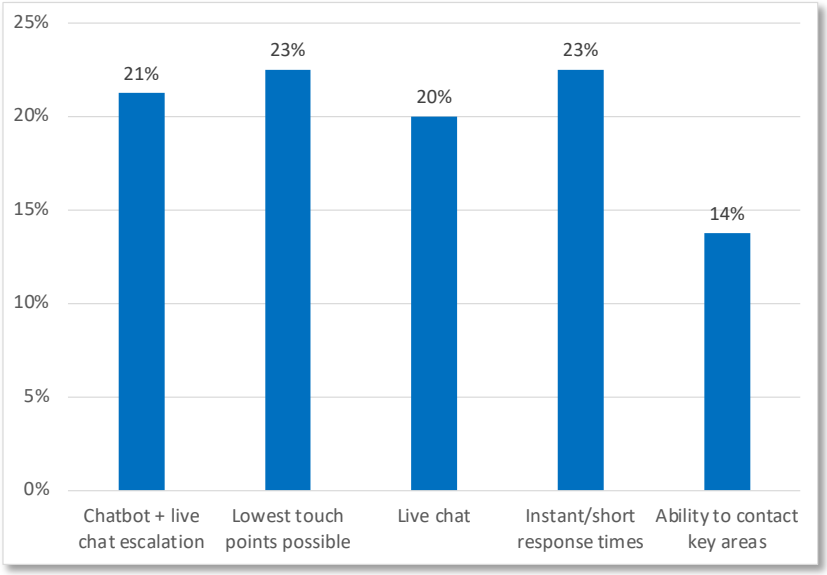

Chart 4: Average cohort responses for the most important workplace Support attribute

[131] B Berman. (2020). Paths to Purchase: The Seven Steps of Customer Purchase Journey Mapping. Rutgers Business Review. Spring; pp: 84-100. https://rbr.business.rutgers.edu/sites/default/files/documents/rbr-050106.pdf

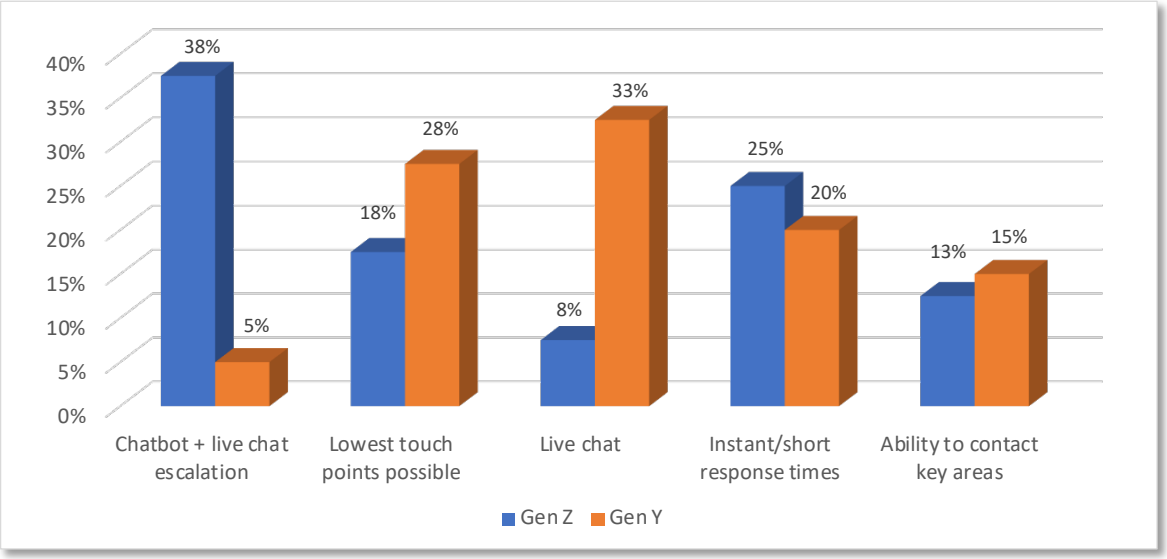

Chart 5: Gen Z vs Gen Y responses for the most important organisational workplace attribute

Chart 5 depicts the variation between the cohort responses. The highest ranked work-related Support activity for Gen Z was for *Chatbot and live chat escalation* with almost 40% of respondents flagging this, around eight times as many as Gen Y, where this was the lowest ranked factor. This trend was reversed with *live chat only* (no Chatbot), identified as the lowest ranked factor for Gen Z. The preferences emerging can be segmented into three requirements:

(1) '*Instant' engagement*: Utilising chat via Chatbot and/or live.
(2) *Low-effort activities*: Multiple contact details provided and personalised engagement.
(3) *Fast response times*. This elicited similar preferences between Gen Y and Gen Z and ranked second and third by each cohort respectively. The ability to contact key areas was ranked fourth by both cohorts.

The results are congruent with findings that highlight the significance of Support in an increasingly digitalising milieu:

- Successful workplaces and brands address consumer preferences by offering multiple engagement options, are mobile-optimised and include Support.[132][133]
- Employees are becoming increasingly dissatisfied with workplace digital capabilities against a backdrop of advances in communications and productivity technology. Despite growth in the use of smart workplace technologies before, during and after the pandemic, the adoption of 'smart digitalisation' remains slow with Support one of the most lagging areas.[134]
- Employees spend on average 2.5 hours searching for individuals and information in the organisation that has been estimated to results in an annual cost of US$7,000 per annum.[135] Servicing these queries with real-time, accurate dynamic data and the 'seamless' connection

[132] B Berman. (2020). Op cit.
[133] Li, H., and Kannan, P. K. (2014). Attributing conversions in a multichannel online marketing environment: An empirical model and a field experiment. Journal of Marketing Research. V(51)1; pp: 40-56. https://doi.org/10.1509/jmr.13.0050
[134] Attaran, S., Attaran, M., Kirkland, D. (2019). The Need for Digital Workplace: Increasing Workforce Productivity in the Information Age. International Journal of Enterprise Information Systems. V(15)1; pp 1–23 https://doi.org/10.4018/IJEIS.2019010101
[135] Ibid.

to the required person or areas via chat, phone and/or Bot remains a significantly requested element of a smart digitalised workforce.[136][137]

- Gen Z will continue to enter the workforce in larger numbers. Along with Gen Y, they are acting as change-agents and demanding the adoption of smart workplace technology including Support.[138]
- Gen Z and younger Gen Y often prefer to communicate through digital and non-face-to-face modes for many day-to-day interactions while recognising the value of personal engagement for career progression, mental well-being, and other areas. In addition, they factor technology 'frustrations' in their decision to leave a workplace with Support increasingly included.[139]
- Emerging areas identified in this research *include Internet of Things (IoT)* that continues to feature as a success factor in organisational Support and increasingly, the 'Internet of People' (IoP) notion that utilises digital technology to run applications remotely for a user.[140]
- Support is critical to onboarding as well as internal communication and workplace activities with just over one in ten Gen Z satisfied with their organisation's onboarding as a key area of digitalised activity and requiring Support to engage.[141] Best-practice organisations are streamlining onboarding processes to minimise the number of touch-points required and reducing multiple approvals, 'manual' process, and adopting a digitised procedure that addresses Gen Z and Gen Y expectations.[142]
- Support that is delivered by digital solutions can provide optimised service, reduce engagement times with employees, automate activities including filling out forms and reporting, and provide the required information expediently at the time required, saving cost, time and engendering employee satisfaction.[143]
- Digital and employee-centred Support tools and processes is integral to delivering efficiencies and productivity. Wirth the advent of cloud-based solutions, these can be adopted cost effectively and scaled rapidly.[144]

The research results indicate that workplace Support lags the degree of digitalisation observed for many other workplace functions. It is forecast to grow in significance and if delivered 'intelligently' with the plethora of low-cost solutions available, the tangible and intangible benefits can be significant for the organisation and employees alike.

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[136] Results from this research confirm the importance of these factors. In addition, Grous, A. (2017), op cit.

[137] Grous, A. (2021). New Era in Experience. London School of Economics and Political Science. https://www.lse.ac.uk/business/consulting/assets/documents/New-Era-in-Experience.pdf

[138] Attaran, S., et al (2019). Op cit.

[139] Ibid.

[140] Haddid, A., and McAllen, D. (2018). Digital Workplace Management: Exploring Aspects Related to Culture, Innovation, and Leadership. Conference: 2018 Portland International Conference on Management of Engineering and Technology (PICMET). DOI: 10.23919/PICMET.2018.8481807

[141] LSE productivity and technology research and interviews with UK enterprise managers: 2016-2022. http://eprints.lse.ac.uk/69181/1/Grous_The%20power%20of%20productivity_report-LSE_2016.pdf

[142] Gupta, R. (2020). How to incorporate technology in the workplace for Gen Z employees. European Journal of Molecular and Clinical Medicine. V(7)10; pp: 3699-3707. ISSN 2515-8260

[143] Jarrahi M. H. (2019) In the age of the smart artificial intelligence: AI's dual capacities for automating and informating work. Business Information Review. V(36)4; pp: 178-187. https://doi.org/10.1177/0266382119883999

[144] Berman, S., and Marshall, A. (2014). The next digital transformation: from an individual-centered to an everyone-to-everyone economy. Strategy and Leadership. V(42); pp: 9-17. DOI:10.1108/SL-07-2014-0048

Summary

Gen Y and Gen Z are change agents promulgating accelerated digitalisation both in the workplace and by their brands. Through the Contagion Effect, their influence permeates into these environments and to other cohorts. This research reaffirms that these cohorts lack the patience and tolerance for technology, processes and communication that are not congruent with their demand for immediate engagement, low touchpoints for information access, communication and Support, rich visual content, and other expectations. These requirements are defining the new normal, with the evolving environment continuing to challenge many organisations and brands. This is exacerbated by the delay in many Gen Z entering the workforce due to Covid-19, and the resulting further strengthening of their symbiotic relationship with digitalisation: they continued to rely on technology throughout the pandemic, without the benefit of workplace peers, managers and others moderating some expectations and adopting others.

A further research finding is the post-pandemic compression of time that Gen Z and Gen Y spend engaging online and with some brands, reflecting a lower tolerance for the absence of concise, relevant information delivered in a mobile-optimised, mixed text and visual mode. This was observed to be on average around four seconds for Gen Z and seven seconds for Gen Y: lower than commonly reported but reflecting the 'agility' this cohort operates with and the online exit where required information is lacking or where price and other conditions for stickiness are not met. This research further highlights that Gen Y and Gen Z are aligning in their demand for flexible work practices, well-being and mental health, ahead of the importance of salary. This represents a shift in behaviour from the mid 2010's, with the exogenous shock of the pandemic ushering a step-change in digitalisation and behaviour for cohorts both in and out of the workforce. At the overarching level, this research indicates that although some Gen Y and Gen Z behaviour was observed to vary between countries, this is not believed to be material and is likely to be a factor of a smaller sample size and a degree of flux as a result in variations in the rate of post-pandemic calibration between countries. As such, the results are applicable across the UK and Europe, and beyond. One of the final observations from the research was the importance of the under-addressed area of *Support* as a cause for dissatisfaction amongst Gen Y and Gen Z, both in the workplace and from brands.

Concomitant to, or perhaps as a result of, a pandemic-accelerated paradigm shift in the pace of digitalisation, this research should be considered a *starting point* to address key cohort requirements that are defining the new normal. Adopting many of these can result in long-term competitive advantage and tangible results while developing intangible elements that create an attractive environment for Gen Y and Gen Z to select, grow and thrive in, or to interact with.


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