

UNiDAYS

# THE FASHI ON PACK

GEN Z: THE APEX  
FASHION CONSUMER



09.21





# GEN Z MADE ME BUY IT...

As the role of real-world fashion adapts, fluid and device-driven business models must emerge for the fashion industry to serve the world's first, and largest, generation of digital natives.

With global digital ad spend on social platforms predicted to hit \$517 billion by 2023, insight into the world's biggest consumer demographic will support the bricks-and-mortar survivors and define the establishment of new fashion brands rising through the metaverse, all with Gen Z at their core.

## UNiDAYS

**UNiDAYS** asked a panel of their 20m+ verified student members for their opinions on all things fashion, in a series of surveys and polls. Over 18k Gen Z students provided insights about their relationships with their devices, platforms, fashion favourites and retail habits. The polls revealed passionate feelings towards clean-washing, conversation commerce, brand intrusion, third gender marketing and lack of trust when shopping through new social media checkout features.





# MEET GEN Z

## BORN BETWEEN 1996-2012

GEN Z ARE THE MOST HYPER-INFORMED, HYPER-CONNECTED AND DEMANDING CONSUMERS IN HISTORY. AT 40% OF TOTAL CONSUMERS, THEY ARE THE BIGGEST GENERATION GLOBALLY WITH A \$3 TRILLION INDIRECT ANNUAL SPENDING POWER.

# 2 BN

DIRECT ANNUAL GLOBAL SPENDING POWER

# 92%

USE DISCOUNT CODES

GEN Z ATTENTION SPAN IS 8 SECONDS.  
COMPARED TO 12 SECONDS FOR MILLENNIALS.



## UNIQUE BEHAVIOURS

They expect customised, personalised products and services plus value, across every device and every platform—all with free delivery. Their real-world and digital existence are basically one and the same, with nuanced values that can seem contradictory on the surface: they love filters but resent retouching, they live and breathe social media, instant messaging, video games and live-streaming—often all at the same time.

## MAKE CONNECTIONS

Their unwavering style, ethics and thrift make Gen Z the ultimate Apex Consumer. Brands must urgently connect with this high potential, savvy, digital-native generation who are reshaping social commerce. Both start-ups and legacy brands could find this new world order daunting, but it represents great possibility.

# 40%

OF TOTAL CONSUMERS IN THE UK, US, EUROPE & BRIC



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20 MILLION VERIFIED STUDENT MEMBERS  
OF UNiDAYS AROUND THE WORLD

# UNiDAYS BY NUMBERS

THE WORLD'S LARGEST AND MOST POPULAR STUDENT AFFINITY NETWORK

150 +

GLOBAL RETAIL  
LEADERS RUN THEIR  
GEN Z STRATEGY  
THROUGH **UNiDAYS**

E.G. ASOS, MISSGUIDED,  
NEW LOOK, SHEIN

800 +

BRANDS PARTNER WITH  
**UNiDAYS** TO CONNECT  
WITH GEN Z

\$5BN

SPENT ON **UNiDAYS**  
SINCE 2018,  
BY STUDENTS





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# FASHION- PHORIA

FOR THE LOVE OF CLOTHES



900%

SAY LOOKING GOOD IS  
IMPORTANT TO THEM





# FASHION PHORIA

UNiDAYS MEMBERS SAY...

90%

SAY LOOKING GOOD IS IMPORTANT TO THEM

93%

LOVE HOW GREAT CLOTHES MAKE THEM FEEL

87%

SAY GREAT CLOTHES MAKE THEM FEEL SEXY

96%

SAY FABULOUS CLOTHES MAKE THEM FEEL CONFIDENT

80%

ENJOY A MIX OF STYLES

56%

SAY THEY DON'T FOLLOW FASHION TRENDS

GEN Z ARE FULL-ON FASHIONISTAS, THEIR STYLE, HABITS AND ETHICS DRIVE AND DOMINATE THE TRENDS AND PATTERNS SEEN THROUGH SOCIAL MEDIA AND THE SURROUNDING GENERATIONS TODAY.

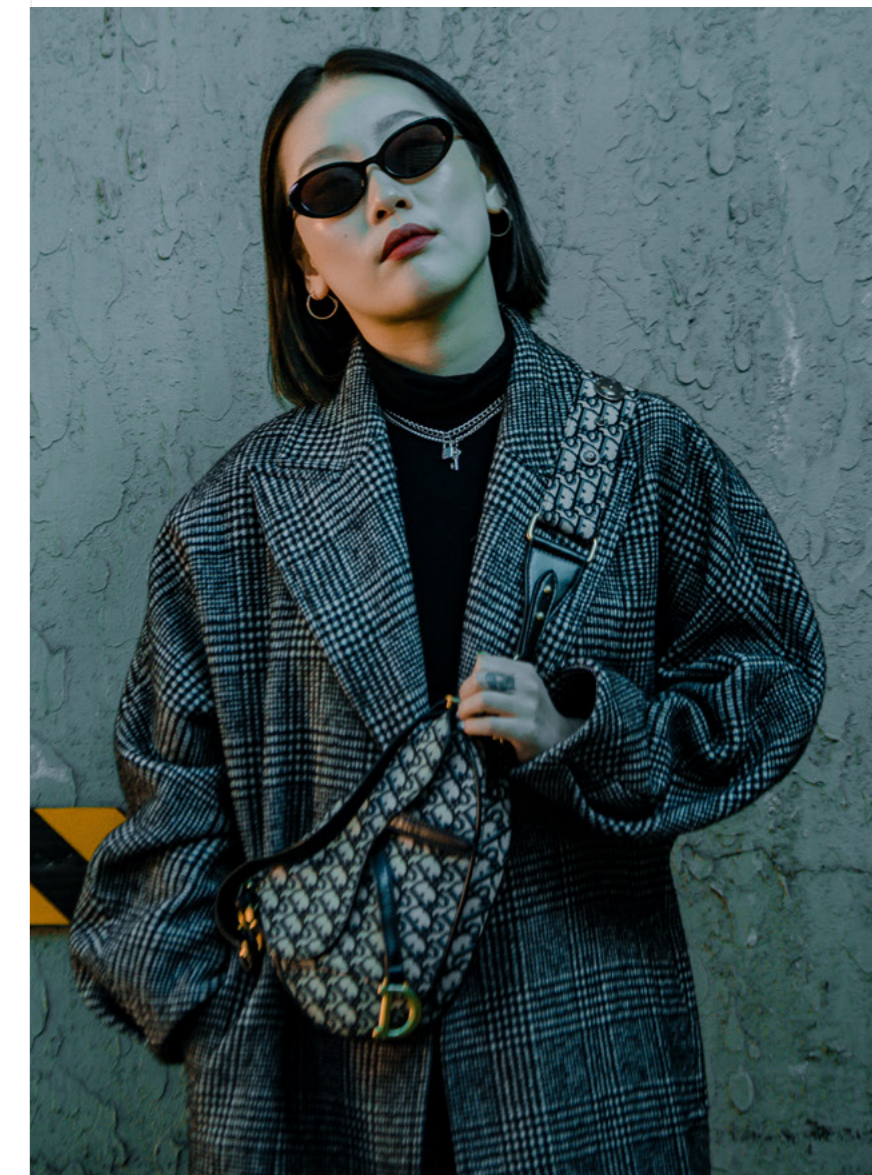
87% of Gen Z agree that great clothes make them feel sexy, 96% say fabulous clothes make them feel confident and 79% state sustainable fashion is important to them. But they never pay full price. For anything.

**IF GEN Z ARE NOT YOUR CORE CONSUMER NOW, THEY SOON WILL BE.**

Gen Z maintain their own personal brands physically and across their platforms, with defined standards and values that dictate the brands they associate with. The average Gen Z spends 10.6 hours a day online (Adobe), 93% love great clothes and 85% of them research everything online before buying. Their appetite for social is huge and brands have been quick to embrace the fun and engagement that quality content generates. But with 75% of Gen Z stating they don't trust shopping on social media, there is a disconnect between entertainment and commerce which brands must fast address. Gen Z are consuming culture and marketing in a fundamentally different way than Millennials or Gen X (the over forties).

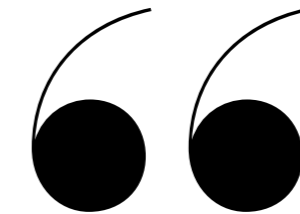
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Of those surveyed, 87% of Gen Z mostly communicate with their friends through instant messaging, just 13% call them direct, and only 14% would try a new fashion retailer based on seeing a TV ad. Fashion brands must get creative to establish and nurture these new relationships to ensure they stand the test of time.





DON'T  
MAKE  
ADS.  
MAKE  
TIKTOKS.



WE FOUND THAT, FOR GEN Z, TIKTOK IS THE PLACE TO BE ON SOCIAL, FOLLOWED BY INSTAGRAM. GIVEN THAT FASHION PURCHASES MADE BY 49% OF THOSE WE SPOKE TO WERE INFLUENCED BY BRANDS THEY SAW ON SOCIAL MEDIA, PLATFORMS LIKE TIKTOK AND INSTAGRAM ARE A GROWTH OPPORTUNITY FOR FASHION RETAIL MARKETERS LOOKING TO DRIVE BRAND AWARENESS AND SOCIAL COMMERCE. ANOTHER IMPORTANT FACTOR STEMS FROM TIKTOK'S EARLY GUIDANCE TO MARKETERS: DON'T MAKE ADS. MAKE TIKTOKS.

VIVIANE PAXINOS  
GLOBAL GM UNiDAYS



# GOOD NEWS FOR FASHION

UNiDAYS MEMBERS SAY...

76%

ARE LOOKING FORWARD  
TO PARTYING AGAIN

64%

EXPECT TO SPEND  
MORE ON OUTFITS  
FOR EVENTS NOW

78%

PLAN TO DRESS UP PARTY  
NOW THAT LOCKDOWN  
HAS EASED

54%

WILL SPEND MORE ON  
BEAUTY NOW SOCIAL  
OCCASIONS ARE BACK



DESPITE 18 MONTHS IN LOCKDOWN, 90% OF GEN Z STILL VALUE LOOKING GOOD. HOWEVER, 65% EXPECT THEIR FASHION PURCHASES NOT ONLY TO BE AFFORDABLE, BUT TO BE MADE TO THE HIGHEST ETHICAL STANDARDS. FASHION, FAST OR OTHERWISE, CAN NO LONGER RELY ON VALUE ALONE.

“Audiences go to the likes of TikTok, Instagram, Snapchat and YouTube for exclusive moments, entertainment, advice, humour, and authenticity in content. Fashion brands need to create content that feels genuine for the environment, or Gen Z consumers will swipe to the next video. Fashion brands should also be looking at social commerce as part of their wider omnichannel retail strategy, driving consumers in-store for brands where bricks and mortar play an important role. 84% of Gen Z are looking forward to returning to shops, and it shouldn’t be underestimated how impactful a shareable, interactive store experience would be in driving positive online endorsement and sales.”

VIVIANE PAXINOS, GLOBAL GM UNiDAYS





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MONEY TALKS BUT  
FULL PRICE WALKS

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**THE BIGGEST CONSUMER DEMOGRAPHIC GROUP IN THE WORLD ARE THE DEFINITION OF THRIFTY, PRACTICAL AND DETERMINED.**

Tailored deals drive loyalty, instore and online. However, while price is the main driver it's not at the expense of ethics.

Gen Z appreciates quality, sustainability best practice and offers—and they expect brands to deliver on all three. Fast fashion Insta-favorites like ISawItFirst and NA-KD may seem the obvious choice for Gen Z, but for higher price point brands that also need to drive student engagement, offering seasonal deals and added-value options such as a repair service for worn clothes, lifetime guarantees and an unlimited returns policy, prove popular too.

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**95% OF THE 5,000 QUESTIONED  
KEEP AN EYE OUT FOR OFFERS.**

**GEN Z WILL  
NOT PAY  
FULL PRICE.  
FOR ANYTHING.**





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# EXTREMIE VALUE

UNiDAYS MEMBERS SAY...

**95%**

ALWAYS KEEP AN EYE OUT  
FOR A BARGAIN OR OFFER

**75%**

ARE USED TO BUYING  
CLOTHES SOLELY ONLINE  
DUE TO LOCKDOWNS

**53%**

SAY SHOPPING IS A  
SOCIAL EXPERIENCE  
SHARED WITH FRIENDS

**85%**

RESEARCH ONLINE  
BEFORE COMMITTING  
TO A PURCHASE

**82%**

ARE LOYAL TO BRANDS  
THAT OFFER REGULAR  
DISCOUNTS

**66%**

INTEND TO SPEND MORE  
ON CLOTHES WHEN THEY  
GO BACK TO UNI

**63% SPENT LESS ON CLOTHES DURING LOCKDOWN  
WHILE 37% SPENT MORE.**





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84%

ARE LOOKING FORWARD  
TO RETURNING TO SHOPS



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# PUTTING THE FUN IN FASHION

SOCIAL ENTERTAINMENT ENGAGEMENT





# LIFE ONLINE

A NEW POLL BY ADOBE REVEALS GEN Z SPENDS 10.6 HOURS A DAY ENGAGING WITH CONTENT ONLINE.

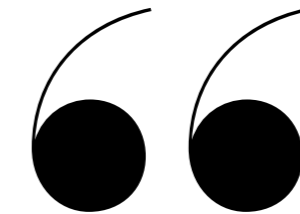
Currently, brands are using influencer partnerships, paid posts, discounts and ads between videos on YouTube to engage them. Digital ad spend across social media platforms will reach \$517 billion globally by 2023, taking 61% share of total media spend, according to eMarketer. Given Gen Z accounts for 40% of global consumers, fashion brands must urgently navigate their media habits to ensure they entertain and inspire rather than intrude and irritate.

Gen Z are chatting, researching, watching, sharing, liking, shopping and playing on multiple devices, across multiple platforms, often all at the same time, so platforms like TikTok and Instagram provide massive potential for fashion brands to engage them. While how they consume culture and advertising is highly filtered, 49% of Gen Z don't mind brands advertising to them on social media so long as it's relevant to them.





# GEN Z DON'T FOLLOW FASHION BRANDS



TIKTOK HAS PUT A MASSIVE FOCUS ON ITS CREATOR COMMUNITY AND GETTING BRANDS TO UNDERSTAND THE VALUE AND IMPACT OF USING CREATORS AS A BRAND CHANNEL RATHER THAN JUST INVESTING IN ADS IN-PLATFORM.

For Gen Z, Instagram is also a perfect platform to discover and connect with retailers and brands. But half of Gen Z (56%) say they don't follow fashion brands on social, so brands that collaborate with creators—particularly those which resonate with Gen Z consumers—are gaining organic reach in a way that feels more authentically tailored to the TikTok and Instagram experience.

VIVIANE PAXINOS  
GLOBAL GM UNiDAYS



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# SOCIAL BUTTERFLIES

WHERE GEN Z PLAY

TIKTOK

39%

INSTAGRAM

37%

FACEBOOK

10%

SNAPCHAT

9%

TWITTER

5%



# THE FASHION PACK

# SOCIAL TITANS

ACROSS INSTAGRAM, TWITTER AND TIKTOK, GLOBAL AND/OR UK ACCOUNTS



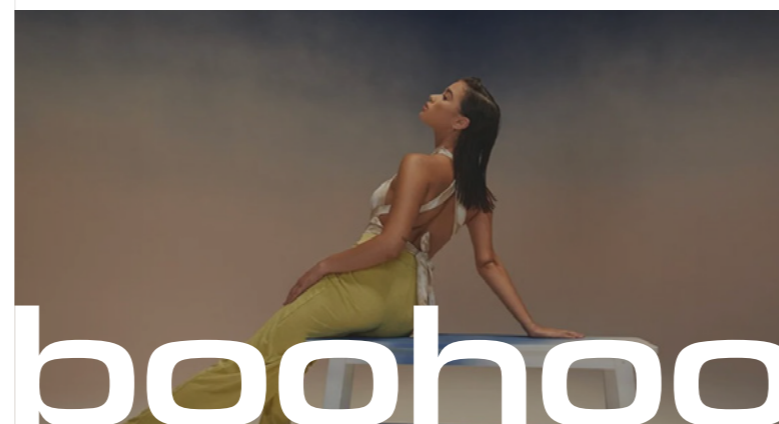
## ALWAYS SETTING INDUSTRY STANDARDS

They leverage their team to showcase looks and products, making it all feel like they're sharing fashion secrets.



## THEIR ACCOUNTS CELEBRATE FEMALE EMPOWERMENT THROUGH FASHION

Their brand identity comes to life through behind-the-scenes videos and competitions.



## THEIR DEBUT TIKTOK SOUND 'IT'S FROM BOOHOO BABY'

Driving a dance craze using influencer collaborations has been laser focused to impact Gen Z.

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**13.6**  
**MILLION**  
— FOLLOWERS

**17.6**  
**MILLION**  
— FOLLOWERS

**11.8**  
**MILLION**  
— FOLLOWERS



# THE FASHION PACK

INSTAGRAM IS THE GO-TO PLATFORM FOR FINDING NEW MUSICIANS, BEAUTY HACKS AND DISCOVERING NEW FASHION BRANDS, INFLUENCERS, MICRO-TRENDS, MACRO-LOOKS AND CLOSET ACCOUNTS.

Insta's emerging shopping function now allows brands to post real-time and pre-made videos and images that users can browse and shop. While the Instagram checkout feature is still being tested, companies can set up brand pages and tag items in their posts which click through to the relevant page of the company's website.

The save button allows users to build a wish list for buying later.

"BUSINESSES WITH CHECKOUT ON INSTAGRAM CAN ANNOUNCE AN UPCOMING EXCLUSIVE DROP, SO PEOPLE CAN PREVIEW DETAILS AND SET REMINDERS TO BUY AS SOON AS IT'S AVAILABLE. CURRENTLY AVAILABLE TO ELIGIBLE US BUSINESSES ONLY." —**INSTAGRAM**

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ONES TO WATCH: BEST FASHION INSTAGRAMS

# INSTA COMMERCE





# GAMING FUSION

SOCIAL MEDIA AND BUYING ONLINE HAS BECOME SECOND NATURE, CONSEQUENTLY RETAIL, ENTERTAINMENT AND SOCIAL ARE FUSING TO CAPTURE THESE PATTERNS OF BEHAVIOUR, ALL DRIVEN BY GEN Z.

Recognising this, Nike, Adidas and Champion have sponsored esports and professional gamers, Net-A-Porter created virtual clothing for Animal Crossing, Gucci collaborated with Sims 4, Nike designed for Fortnite, Louis Vuitton designed skins for League of Legends and Burberry unveiled their own video game. Gen Z gamers have become mainstream influencers. Games have universal appeal with technology allowing for diverse avatars and virtual clothing collections to create an authentic blend of physical and digital consumer universes.





# TRUST AND CONFIDENCE

UNiDAYS MEMBERS SAY...

49%

DON'T MIND ADVERTISING  
IF IT'S RELEVANT TO THEM

83%

WANT TO CUT THEIR TIME  
SPENT ON SOCIAL MEDIA

53%

BELIEVE SOCIAL MEDIA  
IS BAD FOR SOCIETY

76%

SEE TOO MANY ADS  
ON THEIR FEEDS

75%

DON'T TRUST  
SHOPPING DIRECTLY  
ON SOCIAL MEDIA

93%

SAY SOCIAL MEDIA  
PROMOTES UNREALISTIC  
LIFE AND BODY GOALS/  
BEAUTY STANDARDS

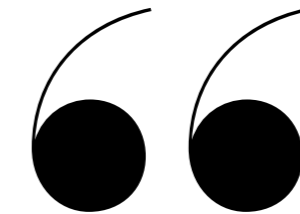
**90% BELIEVE** THAT UNLABELLED, RETOUCHEE IMAGERY  
SHOULD BE ILLEGAL FOR INFLUENCERS TO USE WHEN  
ENDORISING BRANDS/PRODUCTS



For the majority of Gen Z, online is their preferred way to shop; 85% research online first but 75% don't trust shopping directly on social media. Brands creating Instagram and TikTok content and those collaborating with influencers should be cautious, 90% of Gen Z believe it should be illegal for Influencers to use unlabelled and retouched images, while 93% believe social media promotes unrealistic life and body goals. Despite being the world's first fully digital native consumer whose digital presence is as real as their physical one, they challenge everything they see.



# THE NEXT MARKETING BATTLE- GROUND



LOOKING BEYOND SOCIAL MEDIA, TO THE NEXT MARKETING BATTLEGROUND OF WHATSAPP AND OTHER MESSAGING APPS, 76% OF GEN Z WOULD OBJECT TO ADS IN THEIR INSTANT MESSAGING STREAM.

Fashion brands should consider alternative digital and brand-safe environments to sit alongside social strategies, particularly those where Gen Z are actively seeking brands to buy from, and ecommerce performance can be driven direct from shopper engagement.

VIVIANE PAXINOS  
GLOBAL GM UNiDAYS



# INSTANT COMMERCE

87%

TALK TO THEIR FRIENDS BY INSTANT  
MESSAGE MOST

---

76%

WOULD OBJECT TO ADS IN THEIR  
INSTANT MESSAGE CONVERSATIONS

---

88%

CHOOSE TEXT OVER VOICE NOTES

---

# CONVERSATION COMMERCE

60%

WOULD TRY A NEW FASHION RETAILER  
BECAUSE THEIR FRIENDS WERE TALKING  
ABOUT THEM

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26%

WOULD TRY A NEW BRAND BASED ON AN  
INFLUENCER POST

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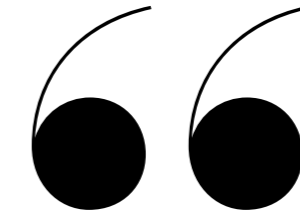
14%

WOULD TRY A NEW FASHION BRAND IF THEY  
SAW A TV AD

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# GEN Z LIVE AND BREATHE SOCIAL MEDIA



THIS DIGITAL-NATIVE GENERATION OF SHOPPERS IS REDEFINING ONLINE COMMERCE. V

They live and breathe social media, instant messaging, video games and live-streaming—often at the same time—and social media’s gratifyingly snackable, swipe-through proposition has absolutely tapped into the type of content that Gen Z actively seek out online and share with their friends. But their expectation of brand behaviour far exceeds any consumer that has gone before.

JOSH RATHOUR  
FOUNDER + CEO UNIDAYS



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# CLEAN FASHION

THE SUSTAINABILITY  
REVOLUTION  
WILL BE SHARED





# CLEAN FASHION

**GEN Z ARE CONFLICTED**, 59% CONSIDER THEMSELVES WOKE, BUT ONE IN FOUR DON'T KNOW WHERE THEIR CLOTHES ARE MANUFACTURED.

Fast fashion serves their obsession for new and fresh, but grates against their ethical guilty conscience of quality not quantity. The rise of Depop and co signifies a new dawn for wardrobe resale hacks that don't cost the earth, but where does that leave fast fashion brands? How deep does their culture of sustainability go?

Gen Z's Earth-friendly attitudes and spending behaviours have triggered fashion to clean up their emissions and exploitation records, so a happy medium is emerging. Sustainability is finally being addressed by brands keen to be on the right side of history and stay relevant. Gen Z has zero tolerance for irresponsible brands, they are the sole demographic with the passion, power and platforms to take sustainability into the corporate boardrooms. Their digital and physical life are one of the same, which ensures their social media posts will continue to elevate those brands that champion change and shame those that blatantly don't.

## SAD BUT TRUE

It takes 3,781 litres of water and 33.4 kgs of carbon emissions to make one pair of jeans

Up to 175,000 tonnes of plastic microfibres are dumped into the ocean each year, equivalent to over 17bn plastic bottles, all from synthetic clothing. Microfibres cannot be easily extracted from water and pollute the marine wildlife food chain.

United Nations Environment Programme (UNEP)





# GEN Z ON CLEAN FASHION

26%

UNSURE WHERE  
THEIR CLOTHES  
ARE MANUFACTURED

59%

CONSIDER THEMSELVES  
'WOKE'

33%

PICK RECYCLED ITEMS  
BECAUSE THEY'RE CHEAPER

79%

SAY SUSTAINABLE  
FASHION IS IMPORTANT  
TO THEM

23%

FEEL PEER PRESSURE  
TO SHOP MORE  
SUSTAINABLY

67%

PREFER FASHION BRANDS  
WHO APPEAL TO THEIR  
SOCIAL CONSCIENCE

68%

WANT CLOTHES  
MANUFACTURED TO  
THE HIGHEST ETHICAL  
STANDARDS

39%

WOULD BUY PRE-LOVED  
BECAUSE IT'S MORE  
SUSTAINABLE

33%

FEEL THAT BRANDS  
WHO CHAMPION  
SUSTAINABILITY DO  
SO IN THE RIGHT WAY



# GEN Z ON CLEAN BEAUTY

86%

SAY CLEAN BEAUTY IS  
IMPORTANT TO THEM

88%

PREFER NATURAL  
BEAUTY AND SKINCARE  
PRODUCTS

86%

BELIEVE ALL BEAUTY  
BRANDS SHOULD BECOME  
ALL-NATURAL OVER THE  
NEXT DECADE

33%

ALWAYS READ THE  
INGREDIENTS LABEL  
BEFORE A PURCHASE

78%

HAVE RETURNED A  
PRODUCT TO THE SHELF  
BECAUSE OF THE  
INGREDIENTS



# RESPON- SIBILITY

WHO DO GEN Z THINK SHOULD BE RESPONSIBLE FOR REGULATING THE BEAUTY INDUSTRY TO ENSURE THEY USE SUSTAINABLE AND HARMLESS INGREDIENTS IN THEIR PRODUCTS?

**20%**

THE GOVERNMENT

**47%**

THE BRANDS THEMSELVES

**29%**

AN INDEPENDENT  
INDUSTRY REGULATOR





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# FLUIDITY IN FASHION

A SASHAY AWAY FROM  
BINARY, GENDERED FASHION



# INCREASED DESIRE FOR GENDER NEUTRALITY



“MORE THAN EVER, MAINSTREAM CONSUMERS ARE BEING CHALLENGED TO RETHINK ACCEPTED SOCIETAL NORMS AND STRUCTURES DRIVEN SOLELY BY GEN Z’S PASSION FOR POST-GENDER DIVERSITY AND INCLUSION.”

—VIVIANE PAXINOS, GLOBAL GM, UNiDAYS

Gen Z embrace gender-neutral products and marketing. Their acceptance has generated a wave of opportunity for fashion and beauty brands to expand into non-binary clothing and product lines. Six years ago, at its height of popularity, Facebook added a third, customisable gender choice that offers 58 identity options such as androgyne, trans-male, trans-person and more—other brands soon followed.

The Beauty industry saw campaigns for cosmetics start to include trans models and cis straight men. Global fashion brands including Farfetch, Missguided, ASOS and Boohoo have all recently launched high profile campaigns featuring diverse and empowering models to promote their inclusive collections.



# BLURRED LINES

GENERATION GENDER NEUTRAL HAS THE LEAST CONCERN OVER OWNING 'GENDER APPROPRIATE' CLOTHING, PREFERRING TO SHOP BY PERSONAL STYLE OF SELF-EXPRESSION, RATHER THAN TRADITIONAL LABELS.

**43%**

BELIEVE THAT ASSIGNED GENDER DOESN'T PLAY A ROLE IN CHOOSING CLOTHES

**23%**

THINK GENDERED LANGUAGE IN STORES IS OUTDATED OR OFFENSIVE

**79%**

ARE NOT PUT OFF BUYING CLOTHES THAT ARE MARKETED TO THE OPPOSITE GENDER

**64% HAVE BOUGHT CLOTHING FOR THEMSELVES THAT IS MARKETED TO THE OPPOSITE GENDER**





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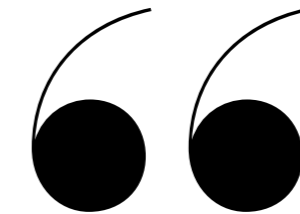
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# SERVING LUXE

GEN Z AND DESIGNER FASHION 2.0



# LUXURY BRANDS MUST ADAPT



BE AWARE, BRAND EQUITY THAT TRIGGERS GEN X WILL NOT TRIGGER GEN Z. 79% OF YOUNG CONSUMERS AGREE THAT SUSTAINABLE FASHION IS IMPORTANT TO THEM AND 68% WANT CLOTHES MANUFACTURED TO THE HIGHEST ETHICAL STANDARDS. LUXURY BRANDS MUST ADAPT THEIR NARRATIVE TO APPLY TO THE NEW APEX CONSUMER THAT IS GEN Z. GENERIC CLAIMS OF CRAFTSMANSHIP WON'T CUT IT WITH THIS DEMANDING ETHICS DRIVEN GROUP, THEY WANT SPECIFICS.

JOSH RATHOUR  
FOUNDER + CEO UNIDAYS



# LABEL LOVERS

LUXURY BRANDS OBVIOUSLY FIND ENGAGING WITH YOUNG CONSUMERS DIFFICULT AS **71% OF GEN Z FEEL DESIGNER BRANDS ARE NOT RELEVANT TO THEM.**

But by over-focusing on Gen X (the over forties) and not connecting with a younger audience, aspirational brands risk not only alienating their appeal to Millennials but their future core consumer too. Brands that underestimate Gen Z risk their relevance and label longevity.

Gen Z are the most demanding, informed and least loyal consumers in history, if they find a brand irrelevant now, the likelihood is they will never buy into the brand at all. Affinity is seeded in youth. Luxury brands that don't emotionally engage with their future consumer will ultimately fail.





# DESIGNER DESIRE

UNiDAYS MEMBERS SAY...

**32%**

FOLLOW DESIGNERS

**40%**

HAVE AN EYE FOR  
LIMITED-EDITION

**47%**

BUY LUXURY CLOTHING  
AS A TREAT

**27%**

BUY LUXURY CLOTHING  
FOR THE QUALITY

**54% DESCRIBE THEMSELVES AS LOYAL  
TO CERTAIN FASHION BRANDS**





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# LOVING LUXE

UNiDAYS MEMBERS SAY...

**30%**

HAVE BOUGHT 1-2 PIECES  
OF DESIGNER CLOTHING  
THIS YEAR

**50%**

SAY THEY'VE BOUGHT  
MORE FASHION IN 2021  
THAN PREVIOUS YEARS

**47%**

NAME DESIGN AS THEIR  
TOP CONSIDERATION  
WHEN BUYING LUXURY  
FASHION

**64% NAME PRICE AS THEIR TOP CONSIDERATION  
WHEN BUYING LUXURY FASHION**





71% DON'T FEEL DESIGNER BRANDS ARE RELEVANT TO THEM

# HOWEVER...

54%

DON'T LOVE LABELS

77%

SAY THEY CAN'T AFFORD  
DESIGNER BRANDS

27%

BELIEVE DESIGNER  
CLOTHES ARE OF  
HIGHER QUALITY

54%

HAVEN'T BOUGHT  
ANY LUXURY FASHION  
THIS YEAR





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# THE FUTURE OF FASHION

CONCLUSIONS FOR TODAY'S RETAILERS



# DON'T SURVIVE, THRIVE

## IF GEN Z ARE NOT YOUR CORE CONSUMER NOW, THEY SOON WILL BE.

Gen Z are defining which fashion brands survive and which brands thrive. Those labels comfortable with Gen X and Millennials must learn what triggers Gen Z and fast.

Affinity is seeded in the young, fashion brands that don't bother engaging Gen Z will ultimately fail. But despite being the world's first fully digital native consumer with defined personal brands, and whose digital presence is as real as their physical one, Gen Z's relationship with the platforms they populate is guarded at best.

Brands must work hard to win trust in the social space.

Gen Z has zero tolerance for blatantly unethical behaviour, they are the sole demographic with the passion and power to take sustainability into corporate boardrooms. Their unwavering standards, ethics and thrift make Gen Z the ultimate Apex Consumer.

Brands must urgently connect with this unfamiliar, contrary, digital-native generation who are reshaping social commerce. Fashion start-ups and legacy brands could find this new world order daunting, but it represents great possibility.



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WHAT'S YOUR  
GEN Z STRATEGY?

**CONTACT:**  
[GENZ@MYUNIDAYS.COM](mailto:GENZ@MYUNIDAYS.COM)

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# MEET GEN Z

AND THEIR STRONG  
OPINIONS ON FASHION,  
IN THEIR OWN WORDS





# WILLIAM JACOBS

## WHEN FASHION SHOPPING, I USUALLY DO SO WITH A SPECIFIC BRAND IN MIND.

I will start by browsing that brand's catalogue, primarily through their Instagram page or website, to find items that interest me. I rely a reasonable amount on recommendations from my friends, and will strongly consider their experiences with brands before making purchases of my own.

For designer clothes, I enjoy outlets as a way to be exposed to new products; I am much more likely to buy something if I've seen it in real life rather than just online.

As far as fashion brands go, I am a fan of Vans shoes as their products are comfortable, aesthetically pleasing and reasonably priced for their high quality. I am similarly a fan of Jack Wills: they have some simple and classy designs with high-quality materials at reasonable prices. I think

fashion brands should advertise with as much authenticity as possible, with an emphasis on the aesthetic that their products complement. For instance, Vans are often associated with musicians, and they tap into this aesthetic by collaborating with and promoting artists with online events and music festivals. This type of advertising feels authentic and strengthens the brand's cultural and aesthetic associations.

## I AM NOT A BELIEVER IN FAST FASHION, AND I GENERALLY AVOID BUYING CHEAP CLOTHES.

I usually prefer to save up for fewer, high-quality clothes that will last longer and that I will enjoy more, as opposed to many cheap clothes which are not only lower in quality but considerably less ethical. That said, I will still purchase the occasional shirt from somewhere cheaper for convenience and price—I am fully aware of the hypocrisy there!

I think a lot of gendered advertising is quite simplistic, failing to affect or convince me as a result.

Lots of men's brands appeal to a stereotypical 'macho' masculinity that I don't particularly resonate with or care for, and so, such adverts largely go over my head.

## GENERALLY, THE ADVERTISING THAT HAS WORKED ON ME DOESN'T INVOLVE GENDER AT ALL.

For instance, the aforementioned Vans events (and their brand in general) are not concerned with gender and instead simply emphasise the aesthetic of their product.

This makes for a much more convincing—and less of a 'pandering'—campaign.

I wouldn't consider myself loyal to fashion brands. While, of course, I prefer some brands to others, I wouldn't purchase an item solely because it comes from a brand I like, nor would I avoid an item solely because it comes from a brand I don't identify with. The quality of the product in question is the most important thing for me, and I consider that on a case-by-case basis rather than in a wider context of brand loyalty.





# NEVE HILL

**I TYPICALLY SHOP FOR CLOTHES IN PERSON, HOWEVER DUE TO THE CURRENT CLIMATE, ONLINE SHOPPING HAS PROVIDED A USEFUL MEDIUM FOR BOTH PURCHASING MY CLOTHES AND INSPIRING MY FASHION CHOICES.**

Using online platforms also allows for convenient returns, making it a cost-effective way to try new and bolder fashion choices without the commitment.

Recently, I have been purchasing the majority of my clothes from Zara. I find their up-to-date comedic-but-stylish marketing tactics appeal to my age group, giving them a heads up in the competitive fashion industry. Goose and Gander are yet another brand that I am heavily targeted in online advertisement. Their use of bold and graphic advertising campaigns make them stand out, making them eye-catching to an everyday social media user thus drawing in more buyers of the company. Related to this, Goose and Gander follow a strong ethical stance towards their company: using cardboard packaging, hand making every

garment to order etc. I think in order for fashion brands to move forward, they must strive for sustainability and a reduced carbon footprint.

I am very split between the idea of gendered clothing. On one hand, I think it is good to target women's clothes to women and vice versa as it avoids confusion as a consumer. However, as we are moving into a generation where gender stereotypes are no longer acceptable, I think the movement to more unisex clothes will be increasingly popular. This has already been seen with brands such as Collusion and Goose and Gander who advertise themselves as unisex. Personally, I believe this is an important step in the right direction. Rather than feeding into gender stereotyping, we should move towards a new kind of style that any gender would feel comfortable in. Plus, many women buy male clothes/hoodies anyway, so why not appeal to that?

My loyalty for a brand comes from many things. Packaging is crucial: those brands who can create aesthetically pleasing packaging can make a customer (including myself) feel more excited to receive their parcel. A good example of this can be seen with more designer brands like Chanel. The customer is not only excited to receive their item but can also use the packaging as something decorative within their home. I also find that good customer service (in person and online) makes someone loyal. Big brands can lack good customer service due to volume of orders they receive. However, focusing on this can make myself and other customers feel more at ease if anything goes wrong with their items. The quality of clothes is another main factor in my loyalty to a brand. If the brand is consistent, with a fair price tag to match it, I will be more inclined to purchase from them in

the future. If brands do collectable pieces or collaborations, I do become more interested. For example, Levi's and Vans are a major brand that focus heavily on collaborations that are (importantly) to a very high quality and pieces that I am willing to buy (Snoopy for Levi's, Spongebob for Vans). Collaborations are key within PrettyLittleThing and Boohoo, using influencers as their main collaborators. I believe this is a clever marketing tactic – especially at times when shows like Love Island are at their peak as they can appeal to a very specific demographic who are all interested in the same style.

Finally, I am loyal to brands who have a good social media account. More specifically, those who repost pictures of customers and that provide incentives to do so (e.g., win a £30 voucher if you post a picture in your favourite [insert brand here] hoodie). By doing so, it not only encourages myself to buy clothes from this brand as a result of this incentive, but it feels more personal as a consumer to see others in the brand's clothing—rather than just models you can't relate to.





# DAISY WALTON

**I WOULD USUALLY SHOP ONLINE FOR CLOTHING BUT WOULD USE INSTAGRAM AND APPS SUCH AS PINTEREST FOR IDEAS OF OUTFITS AND PIECES OF CLOTHING THAT I MIGHT LIKE TO BUY.**

I would also use streetwear social media accounts for inspiration and search keywords into Google or Safari.

Fashion brands I particularly connect with are ones that not only promote a sustainable model of production but also are inclusive and promote intersectional feminist values. I also like to support brands that are actively making a difference, such as Marley headphones which are carbon neutral, Columbia sportswear and also Patagonia, as they have a lifetime guarantee on their products. I also particularly enjoyed the recent Nike advert which included women from all different walks of life promoting diversity and inclusion in sport.

My attitude towards ethical and sustainable fashion is that it is paramount in the current climate we live in. Not only is it essential that we support brands that are sustainable, ethical, and treat their workers fairly but it's important we actively acknowledging the impact that fast fashion has on the world and the dangers of it.

I am loyal to brands which prove that they have environmentally and human-rights friendly ethics.





# BIBI DE BRUIJN

**WHEN SHOPPING FOR CLOTHES, I USUALLY LOOK ONLINE OR BRAND APPS LIKE ASOS AND URBAN OUTFITTERS. I ALSO LIKE TO SEE WHAT THE NEW TRENDS ARE.**

I spend a lot of time looking through apps like 21 Buttons where users post photos and then tag the clothing items in a social media-like photo so you can see how it could potentially be styled. I will browse when I go to physical shops but it's normally more chaotic with everyone there. Conversely, shopping in person is easier because you can try on clothes right there in the shop.

I shop in quite a variety of places including ASOS, Urban Outfitters, PrettyLittleThing and Primark and I love all these places for different reasons. Primark is good for essential items like underwear and socks, Urban Outfitters is incredibly in-fashion, so all items are nice to own (although expensive), and PrettyLittleThing is useful for going out dresses for cheaper prices.

Brand ambassadors are very useful because you can see how clothes can be styled and how they sit on real people. I also believe that the apps available like 21 Buttons are brilliant for brands to be shown on.

I do try to stay away from fast fashion outlets, and do I enjoy shopping in more ethical sections of websites. In the current fashion world, it is more popular and acceptable to wear sustainable items. I believe that the more sustainable fashion is, the better.

On similar lines, in this society I think websites should not gender items as much. I enjoy wearing baggy jumpers which would probably be associated more closely with men's fashion. I wouldn't say I'm a loyal customer to many brands, but if brands created discounts for loyal customers who spend lots of money with them, it would entice me to spend more with them in the future to get those discounts.





# MARSHALL LAWRENCE

**FOR ME, I SHOP FOR FASHION BASED ON TRENDS REALLY, I TEND TO SEE WHAT I LIKE THROUGH TIKTOK AND PINTEREST AND TRY TO FIND CHEAPER ALTERNATIVES ONLINE.**

I research using what comes either on my tiktok FYP or what I see on Pinterest. I shop mainly through asos as it's easier and I trust it compared to SHEIN.

My favourite brands are ASOS, koi footwear and Jaded London as they're bringing the high-fashion streetwear trends but to a cheaper, more accessible level. My favourite adverts are the ones that look good and are short-form content so you don't have to keep watching them. Plus, adverts that are interactive & doing something different.

The fashion brands I connect with use the platforms we're using, speak the way we do and really just share and resonate the same values we do, too. The fashion brands I am loyal to include Collusion, Jaded London, Koi and Converse. I love ethical fashion however I feel that a lot of people are slated for buying fast fashion even though that's the only thing they can afford. I definitely try to shop ethically and I feel like a lot more brands should do that, too. I also feel like a lot of brands should follow Collusion and create gender neutral clothing too, as I feel that menswear is kinda limiting at times.

My favourite fashion items are most definitely the Jaded London x Curly Fry collab.





# EVA BUDVYTYTE

**I MOSTLY ENJOY SHOPPING IN PHYSICAL STORES BECAUSE I CAN TRY THE CLOTHES ON AND INSTANTLY SEE WHETHER IT SUITS ME OR NOT. IF IT'S A MORE EXPENSIVE PIECE, I WILL OFTEN CHECK IF I CAN GET IT CHEAPER ONLINE.**

I don't feel loyal to any fashion brands right now, but something might be developing for Dr Martens. I quite like the fun honesty in their recent ad about breaking in docs. They clearly state their disadvantage, but who cares about that when the shoes look and make you feel so good. When there's something more than just appealing images in their ads, when there's something unique about them, and in their tone of voice - this is when I connect with brands.

Some brands also have the capability of making you feel a part of a community. even if you don't know anyone from that community personally. (For instance, you see a cool punk in docs and you feel that wordless connection and nothing else is needed).

If I hear that a brand is sustainable, I will favour it more, but I will not buy only from those. However, if I heard that a particular brand uses animal fur or harms animals in other ways, that would put me off from buying.

Even though I understand the negative impact of fast fashion - it's grim - I do not avoid it, although I still think most of my clothes last for a few years. Definitely not shoes, though...

I have nothing against gender-fluid fashion, I already noticed that the men's section often has nicer designs. For instance, male Star Wars t-shirts were nice and minimalistic while female ones had unnecessary glitter.





# ERNESTA JOVARAUSKAITE

**WHEN I SHOP FOR FASHION I USUALLY CHECK OUT MY FAVOURITE WEBSITES SUCH AS ASOS, MANGO AND PANGAIA TO SEE IF THEY HAVE ANYTHING ONLINE, BUT SOMETIMES IT'S WAY TOO MUCH TO GO THROUGH ALL THE ITEMS SO I LIKE POPPING INTO THE SHOP FOR A MORE CURATED EXPERIENCE. I USUALLY USE GOOGLE OR INSTAGRAM TO RESEARCH.**

I would say great fashion advertising that is engaging would either be a sale, or something with very strong visuals that catches my attention and reflects my mood. I like seeing seasonal items that are on trend or some more information about why the brand does what it does, where it produces, what materials it uses, what initiatives it's involved with... basically showing me that it's not just there for profit, but that it cares about fashion, the consumer and its effect on the environment.

I've started getting into ethical fashion more recently, because I have had a realisation that A) I don't need to

constantly be shopping and B) throwing away items that no longer suit me, but rather purchase a good quality item, made responsibly (even if the materials aren't 100% sustainable) but seeing that the company cares and that the item will last me a long time. I've definitely cut down shopping for fast fashion items, because they last less, they are made with awful materials (polyester, nylon—I try to stay away from unless I really need or love an item), but I have managed to cut down shopping with fast fashion brands from 15-20 times a year to maximum 2-3. Luxury brands I have a few that I love and follow but overall feeling is that they are way too expensive and quality isn't always matching the price.

I would say H&M is one of those fast fashion brands that I still shop at only because of all the extra efforts they are making to research more sustainable ways of producing stuff and also their creativity (doing collaborations with designers, interior artists, etc).

I'd say I'm quite loyal to the brands I like, but if the brand isn't evolving with contributing to communities and research on how to pollute less, then I can very quickly switch off and not buy it again.

