

THE FASHI ON PACK

GEN Z'S ATTITUDES TOWARDS
GENDER-FLUID FASHION



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FASHION IS POWERFUL.

We have limited abilities to change our race, age, body size or ability. But, it's fashion that allows us to express ourselves to the world with a statement, "this is who I am and how I feel". Fashion is fluid and we navigate our apparel, accessories and skin care to align with our sense of self. Yet, for far too long, societal gender expectations have mandated how we present ourselves. Yet, these mandates have limited our ability to fully express our authentic selves.

Today, we are at the centre of a cultural zeitgeist that challenges these artificial rules. Today, Gen Z and others are rejecting societal beliefs, leaning into the fluidity of fashion and self expression. We are no longer this or that. We are this AND that.

When I created The Phluid Project, the name set the tone of what we were here to do. Fluid is the ability to easily navigate between two binary constructs, allowing for freedom and curiosity. The ph was added to represent balance, offering permission to find the beautiful balance in each of us. Project is a group of people working together to make something better. When we opened the world's first gender free store in Noho NYC 2018, we joined a movement of humans united to challenge the ethos of past traditions, unleashing the creativity and the community to be

ourselves in a safe and affirming space. The world took notice and an intangible concept became a physical reality. The brand was born and continues to flourish through gender-free fashion, community, activism and education.

The work from **UNiDAYS**, which seeks to highlight Gen Z's attitudes towards non-binary fashion, is based on the findings of a survey of 4,627 University students from the USA, UK and Australia, while offering leaders with actionable insights that enable them to better service this highly influential market.

The facts are the facts and indisputable. There is a new generation leading our society and the future is fluid.

As you process this data and insight, please remember, we are in a constant state of unlearning and relearning. It is each leader's responsibility to their employer, to their employees, to their customers and to the shareholders to lean in and learn. The truth is, we all benefit when we break the binary.

Rob Smith (He/ They) | CEO & Founder
[The Phluid Project](#)

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INTRODUCTION TO GENDER- FLUID FASHION

IT'S 2016, HUNGARY.

WE'RE ON THE SET OF DENIS VILLENEUVE'S BLADE RUNNER 2049. WALKING THE CITY'S FUTURISTIC STREETS, WE PASS MEN IN MACHO LEATHER JACKETS AND WOMEN IN SKINTIGHT NEON DRESSES.

SO THIS IS FASHION IN 2049, HUH?



GRANTED, WE'RE LOOKING AT THE FUTURE OF FASHION THROUGH THE EYES OF A HOLLYWOOD COSTUME DEPARTMENT. BUT IT MAKES YOU WONDER - WILL GENDERED FASHION EVEN BE RELEVANT IN 30 YEARS?

YOU NEEDN'T LOOK FAR FOR CLUES.

In Kerala, the ruling Communist party of India wants to see gender-neutral uniforms¹ implemented in all schools across the state to help tackle gender inequality.

While in California, a gender-neutral retail law² (AB 1084) was recently introduced. It requires retail stores with more than 500 employees to provide a gender-neutral area for childcare items and toys.

Globally, children are increasingly being raised to accept and expect gender-neutral options. Children who will be adults in 2049. It raises the question, is gender-neutrality as a 'trend' a misnomer?

Talk to anyone born between 1996 and 2021 (the Gen Z population) and they'd probably say "Yes". For them, gender fluidity is already a priority. They're igniting a fashion revolution, as our report reveals. And this represents interesting challenges for fashion brands.



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WHAT IS GENDER FLUIDITY IN FASHION?

**YOU CAN CHOOSE TO BE A MAN, WOMAN
OR NON-BINARY PERSON REGARDLESS OF
YOUR BIOLOGICAL SEX.**

Because, as Rob Smith, founder and CEO of The Phluid Project emphasises³, today is “all about separating your sexual orientation with your gender identity.”

In fashion, gender fluidity isn’t cancelling trousers or skirts. It’s about recognising that floral prints and button-ups have no assigned gender. That doesn’t mean we should act like gender doesn’t exist. It’s saying, “let’s embrace all the beautiful and diverse ways we can express and play with our gender through fashion.”

Take music and fashion icon, Harry Styles. He loves nothing more than experimenting with clothing, as seen through this Vogue 2020 cover⁴.

The cover was criticised⁵ by conservative commentator Candace Owens who called it an “outright attack on manly men”. Harry responded⁶ with: “To not wear [a piece of clothing] because it’s females’ clothing, you shut out a whole world of great clothes.”

FOR HARRY AND MANY OTHERS OF HIS GENERATION, IT’S THAT SIMPLE. WEARING SKIRTS AND DRESSES BRINGS THEM JOY, SO WHY SHOULDN’T THEY EXPERIMENT?

Whereas for those who represent the trans and non-binary community, gender-fluid fashion is an opportunity to carve a space for themselves and reinvent their identity.

**GENDER FLUIDITY
IS THE FREEDOM
OF GENDER
EXPRESSION.**



WHEN DID GENDER FLUIDITY BECOME MAINSTREAM?

GENDER FLUIDITY DATES BACK⁷ TO ANCIENT EGYPT AND GREECE. BUT WHEN, AND HOW, DID IT TURN INTO ONE OF THE 21ST CENTURY'S HOTTEST MOVEMENTS?

It gained traction in 2017 following the launch of Fenty Beauty's gender-inclusive makeup shades, according to CB Insight's latest report⁸. Shortly after, many top beauty brands—such as L'Oréal and Estée Lauder—followed Fenty's lead.

It didn't take long for fashion brands to start challenging gender norms either, with the likes of Les Girls Les Boys, The Phluid Project, Tomboy X and Wildfang leading the way—brands defined by their celebration of diversity, equality and inclusion.



The Phluid Project in particular is pushing the movement further, partnering with retailers such as Saks Off Fifth⁹ to create gender-fluid apparel. Its goal, as defined by founder Rob Smith¹⁰, is to “undo the system” whereby the fashion industry caters to gender norms.

Bigger brands are also taking notice. In 2017¹¹, ASOS teamed up with GLAAD to create a gender-neutral capsule collection. A portion of the proceeds went towards the Together Campaign¹², an LGBTQ+ rights organisation. Although the collection was criticised for being rooted in “masculine” styles.

Other notable mentions include Gap Inc.-owned Banana Republic which released a gender-neutral collection called Wear and Share in 2020. Abercrombie & Fitch also launched¹³ a 24-piece adults and 11-piece kids gender-inclusive collection in 2021 during Pride Month.

We're yet to see any major clothing brands market themselves as sole gender-neutral retailers, instead favouring one-off campaigns. Are they missing a beat?

A lack of concrete data on the commercial viability of gender-neutral fashion makes this difficult to answer. With our recent study, we aimed to fix that.

FASHION NEUTRALITY KEY FINDINGS

IN FEBRUARY 2022, WE COLLECTED DATA FROM GEN Z STUDENTS.

THERE WERE 4624 RESPONSES IN TOTAL.

FROM THE UK

435

FROM THE US

2929

FROM AUSTRALIA

260

**THE MAJORITY OF RESPONDENTS IDENTIFIED AS
'FEMALE' OR 'MALE'.**

We wanted to gain a better understanding of student behaviours
and sentiment towards gender neutrality in the fashion market.
The results were eye-opening.

GEN Z'S FASHION PRIORITIES

THE MAJORITY OF UK AND US RESPONDENTS CITED PRICE AND COMFORT AS THEIR TOP PRIORITY (AS BACKED BY OUR 2021 REPORT¹⁴).

They also don't want to spend more on gender-neutral clothing. Unsurprising when a huge proportion of Gen Zs say they are stressed about money¹⁵.

GENDER NEUTRALITY WAS THE SECOND-LOWEST PRIORITY FOR STUDENT

But so was sustainability and we know Gen Zs care about the environment: 32% of Gen Zs¹⁶ have taken at least one of four actions (donating money, contacting an elected official, etc) to help address climate change in the last year, compared with smaller shares of Gen X (23%), and Baby Boomer and older adults (21%).

IT'S ALSO WORTH CONSIDERING THAT GEN Z'S MAY ALREADY SEE THROUGH THE BINARY LINES OF FASHION AND SIMPLY BUY WHAT THEY WANT.



GEN Z'S FEELINGS TOWARDS GENDER NEUTRALITY

IT APPEARS GEN Z DOESN'T CARE ABOUT HOW THEIR CLOTHES ARE LABELLED (WHICH BRINGS US BACK TO WHETHER OR NOT THEY ALREADY SEE THROUGH BINARY LINES OF FASHION)

80%

FOCUS ON HOW CLOTHES
LOOK AND FEEL

47%

FOCUS ON HOW
THEY FIT

65%

BELIEVE BRANDS SHOULD PROVIDE
THE OPTION TO SEARCH FOR
GENDER-NEUTRAL CLOTHING.

34%

FOCUS ON HOW
THEY'RE LABELLED

55%

DON'T MIND HOW
CLOTHES ARE LABELLED

WHEN IT COMES TO GENDER-NEUTRAL FASHION,
GEN Z STUDENTS ARE CONSISTENT.



70% (US) and 67% (UK) believe there should be greater
equality and inclusion in fashion.

Many feel minority groups are overlooked by the
mainstream fashion industry. 53% and 49% of Gen Zs
in the US and UK respectively support the inclusion of
non-binary and trans models in the fashion industry.
Over half of students in the US want to see more
diverse product lines.

Most Gen Zs are already buying or would consider
buying gender-neutral fashion (US and UK).

GEN Z'S BUYING POWER

AS GEN Z GROWS UP, THEIR FOUNDING VALUES AND PRINCIPLES WILL BECOME CORNERSTONES OF HOW THEY CONTINUE TO LIVE—AND SHOP. AND THEIR SPENDING POWER WILL MATURE AS THEY DO.

Should their shopping preferences continue in a gender-fluid direction, this presents an enormous commercial opportunity for fashion brands. But gender-inclusive approaches are needed now across merchandising, casting and design to remain in favour with these ferocious fashionistas. The majority of respondents are sceptical about brands' motivations for being inclusive, with 57% stating they come across as tokenistic.

THEY'RE THE BIGGEST GENERATION GLOBALLY, WITH **\$3 TRILLION IN INDIRECT ANNUAL SPENDING POWER** AND **\$2BN IN DIRECT ANNUAL SPENDING POWER** (2021).

GEN Z REPRESENT 40% OF TOTAL CONSUMERS.



THE GENDER- NEUTRAL MARKET

CHALLENGES AND OPPORTUNITIES

AS ASOS DEMONSTRATED WITH ITS 2017 GENDER-NEUTRAL CAPSULE COLLECTION, IT'S EASY TO TRIP UP, EVEN WHEN YOU HAVE THE BEST INTENTIONS.

Here are the main considerations forward-thinking fashion brands must take into account before entering the gender-neutral clothing market.

UNDERSTANDING WHAT MAKES A COLLECTION GENDER-FLUID

Yes, oversized, shapeless clothing does fit into the gender-fluid aesthetic and is well-loved by Gen Zers¹⁷. But, for one thing, it gets boring fast. For another, it does little for the non-binary and trans community who use fashion to experiment with their identity and as a form of self-expression.

Brands that experiment with dresses, skirts, button-ups and knee-high boots when planning and designing a gender-fluid collection will be welcomed. As will models of all genders, shapes and sizes.

LEARNING THE LANGUAGE

'Unisex' is often used interchangeably with 'gender fluid', and many fashion brands use the term 'unisex' to describe or name their gender-neutral collection.

But Christina Zervanos, head of public relations at The Phluid Project, says¹⁸ the non-binary consumer "combats the word unisex because it has the word sex in it. For a lot of people, it speaks to sexuality when it's about how you identify yourself".

'Unisex' can also be seen as an "older term which refers to designs that are not made for a specific body type", adds Brigitte Chartrand, senior director of women's wear buying at Ssense. Something to consider when product planning and liaising with the marketing team.

Understanding and respecting trans and non-binary pronouns also ensures everyone in the LGBTQ+ community—whether they're employees or customers—feels respected and included.

PRESENTING GENDER-FLUID COLLECTIONS

Remember how 65% of our respondents believe brands should provide the option to search for gender-neutral clothing?

Yet most established fashion brands either lack a dedicated category for gender-neutral fashion or still separate their physical and online stories according to gender. There's a real opportunity to stand out to Gen Zers and the LGBTQ+ community by rethinking the categorisation of product lines.

The biggest challenge with gender-neutral-only clothing is ensuring shoppers can easily find clothes that fit them and look good. Having a selection of diverse models can help. So can having clear labels on sizing. It might also be useful to include keywords in product descriptions such as 'female presenting', 'male presenting' or 'non-binary presenting'.



MAKING BETTER HIRING CHOICES

When launching a gender-fluid collection campaign, your hiring choices play a crucial role.

Let's start with models. It's great to have a collection shot entirely on gender-neutral models. But brands like Gucci have faced criticism in the past for only choosing slim and androgynous non-binary models, which, [some argue](#)¹⁹, is a "tired stereotype".

Since gender-fluid fashion is fundamentally about destabilising gender norms, there's a real need to represent non-binary people who truly challenge femininity and masculinity as objective concepts - those of all gender expressions, body shapes and sizes.

Representation in photographers and other crew members matter too, as Rob Smith of The Phluid Project [highlights](#)²⁰:

"The last thing you want to do is have someone gender-expansive in front of the camera and get misgendered by the person behind the camera."

BECOMING A BETTER ALLY

Gen Zers are sceptical about brand motivations for being inclusive. The biggest red flag? When a brand's culture and behaviours don't match up to the messaging it puts out through gender-fluid campaigns.

Authenticity starts with a genuine passion to be an ally. Immerse yourself in the LGBTQ+ community. Join conversations and listen. Understand what's really important to the people you're representing.

Promoting diversity and inclusivity in the workplace also helps allyship as you create new opportunities in the industry and improve your impact. Plus, by adding diverse voices to the design and production table, you have representation within the business and people who can hold you to account.

Practical changes should be considered too: reevaluating dress code options for staff and [including](#)²¹ gender-neutral restrooms and changing rooms. Getting feedback and opinions from LGBTQ+ staff and customers is also an integral part of making more mindful and informed decisions.

GENDER-FLUID FASHION IS HERE TO STAY

GIVEN THE CHANGES EMERGING AT GRASSROOT LEVEL, MAKE NO MISTAKE: GENDER FLUIDITY ISN'T JUST A TREND. IT'S A MOVEMENT THAT WILL CONTINUE TO TRANSFORM THE FACE OF FASHION. ESPECIALLY IF GEN ZS HAVE ANYTHING TO SAY ABOUT IT.

But the next generation of buyers isn't simply looking for interesting, genderless clothes to wear. They're searching for fashion brands that are true allies. That live and breathe diversity, inclusion and equality. That understand what gender-fluid fashion truly means to the LGBTQ+ community and everyone else in between.



APPENDIX

01/ [VIEW SOURCE](#)

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