

Gen Z vs Millennial Apparel & Fashion

2022 Report



About *knit*

Knit helps brands understand this next generation of consumers through **on-demand feedback from Gen Z & Millennials**. Get instant answers to your biggest youth consumer strategy questions and feedback on all your product or marketing ideas – by tapping into Knit’s youth consumer panel (the largest in the nation). Access both the “what” and “why” behind all your decisions through our extensive quant & qual solutions, and ensure you talk to your exact audience through our robust segmentation capabilities (geo, interests, and more).

Trusted Youth Research provider of:



Send to your entire Gen Z Panel?

225 Respondents

Launch M

More on Knit at: goknit.com

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fashion





The state of retail

There's no denying that the coronavirus pandemic has changed the retail environment, probably for good.

From touch-free shopping to **#tiktokmademebuyit**, what we buy, how we buy it, and where we buy it from looks very different today than it did just two years ago, and it's still changing. Thanks to supply chain snafus and inflation, it's hard to tell what normal even looks like, let alone when we'll "return" to it.

That feels especially true in the apparel retail space, where everything from the ability to try clothes on to where you could wear them was seriously impacted. Early research from [McKinsey](#) painted a particular dire picture.

But last year, the sector [rebounded](#) in a big way: apparel became the most-shopped ecommerce category and exceeded \$1.7 Trillion in spending globally. That's a **16.8% year-over-year increase**.

It seems fitting that an industry so reflective of our collective experience should have such an epic comeback and sunny outlook, doesn't it? We couldn't help but take a closer look.



The Great Generational Rivalry

People just love a good rivalry, don't they? Edison and Tesla. Jobs and Gates. Biggie and Tupac. Lately, we can't help but notice that as **Gen Z** comes of age, there's been a trend in pitting them against **Millennials**, especially when it comes to fashion and apparel.

Whether they're between businesses, sports teams, or siblings, rivalries fulfill our need for a narrative and light up the parts of our brains that like a little bit of low-stakes drama.

It's all in good fun, of course, and a key component of a good feud is an even match – two mostly identical parties competing for one goal. In this case, we guess that would be the right to influence denim silhouettes?

Exhibit A: These headlines to the right..

Can you guess which one we made up?



A



B



C

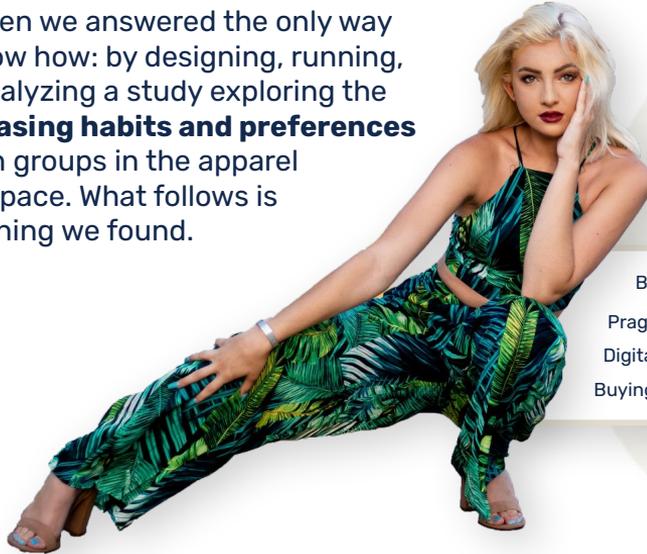


Did you spot it?

We already know you didn't, because exactly none of these headlines is fake. As in: we **literally** can't make this stuff up.

With all of this savage TikTokery and the reams of hot takes they inspire, we thought to ourselves, "Selves, what's the deal with this '**Gen Z vs. Millennials**' rhetoric? Is there anything to it? Are there real-world applications here?"

And then we answered the only way we know how: by designing, running, and analyzing a study exploring the **purchasing habits and preferences** of both groups in the apparel retail space. What follows is everything we found.



Gen Z

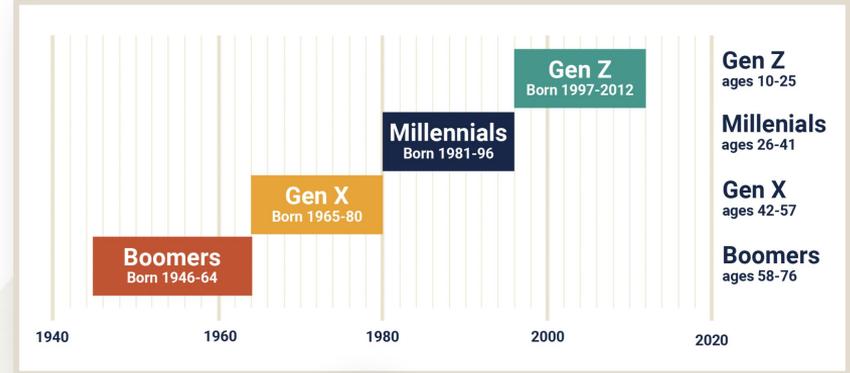
Born between **1997** and **2012**

Pragmatic

Digital natives

Buying power: **\$150 Billion**

Generations Defined



Millennials

Born between **1981** and **1996**

Idealistic

Digital pioneers

Buying power: **\$200 Billion**



Apparel Spend & Shopping Destinations

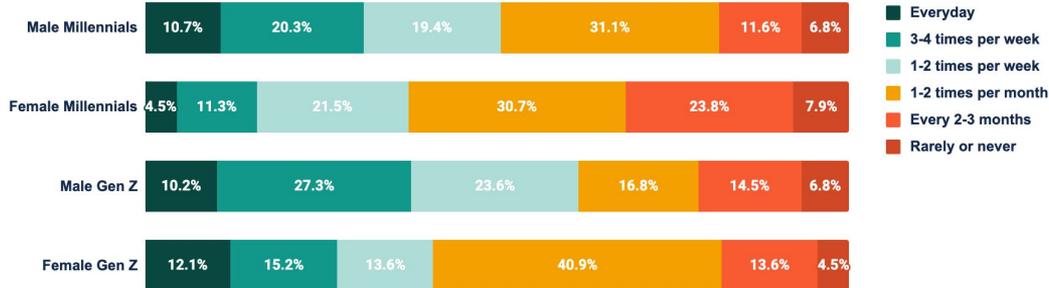


Spendthrifts & Shopaholics

When you think of the archetypal power shopper, what springs to mind? If it's an Andy Sachs or Jules Vaughn type, we wouldn't blame you for the association. But we will correct you. The modern mallrat probably doesn't look anything like the pop culture icons we associate with frequent trips and pricey hauls.

Male-identifying shoppers from both generations **outshopped and outspent their female-identifying counterparts**. It was the first thing that stuck out to us when we analyzed frequency and spend across generation and gender splits:

Apparel Shopping Frequency By Gender x Generation



What's more, two groups immediately emerged as overindexing on opposite ends of the spend spectrum. Millennial males emerged as **"shopaholics"**, which we defined as spending **more than \$500** on clothing and accessories every month. Millennial females clustered together more often as **"spendthrifts"**, or spending **less than \$100** per month.

Average Monthly Spend on Clothing & Shoes

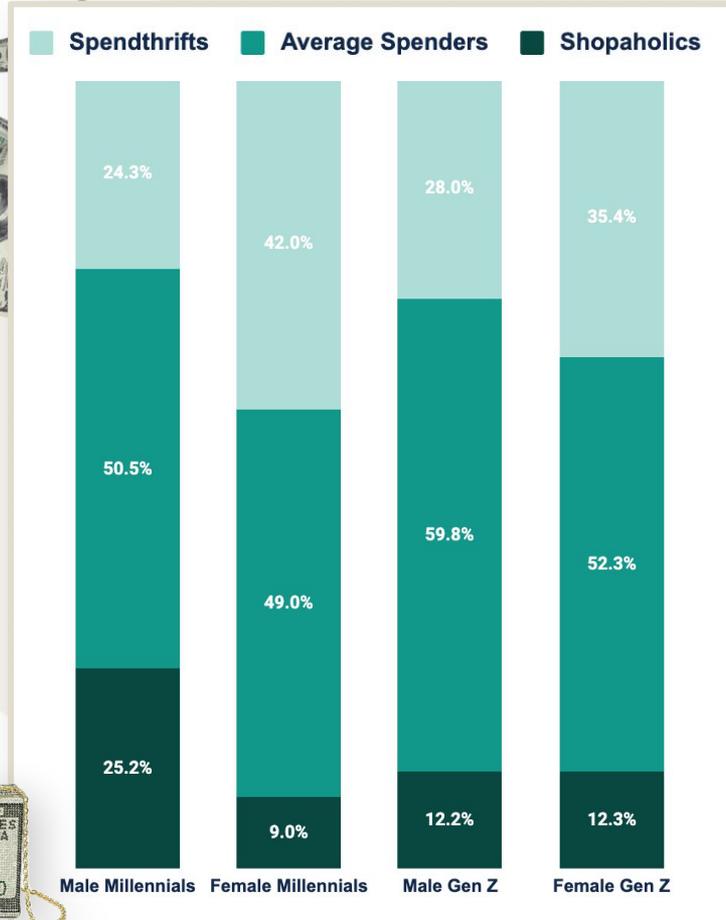
Male Millennials:
\$318.45

Female Millennials:
\$199.17

Male Gen Z:
\$254.51

Female Gen Z:
\$231.31

Average Monthly Apparel Spend By Gender x Generation



Who's using BNPL?

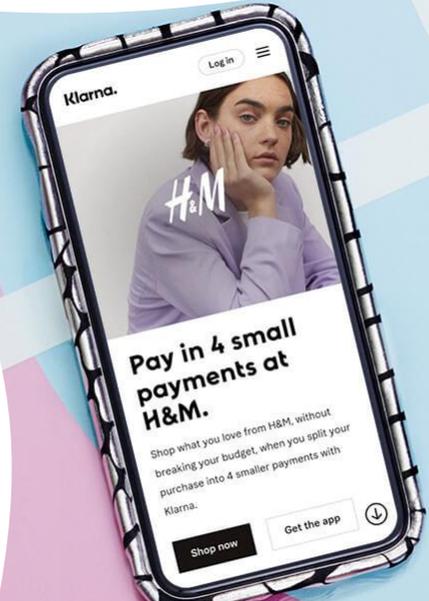
According to our data, **Millennial men** are driving the adoption of “buy now, pay later” (BNPL) options with **36.9%** having used the payment method to make an apparel purchase within the past year and **58.2%** of the group saying they perceived it as “favorable” or “very favorable” – the highest of any group.

Gen Z females, on the other hand, were the **least likely** to have used BNPL and just as likely to perceive it favorably as unfavorably at 32.7%. Awareness was lowest among Gen Z females, too, with 7.3% indicating that they didn't know what it was, the largest of any group. The fact that Millennial males – the biggest fans of BNPL – were also the most aware of the method could point to a correlation between awareness, adoption, and favorability.

36.9%

of Millennial Males have
used BNPL
for apparel purchases

BNPL Favorability by Gender x Generation



Digital Native Women Are Logging Off to Shop

Lots of our shoppers shifted to online merchants, especially when lockdown measures were in full effect – more on that in just a bit – but now that the pandemic has slowed, vaccinations are widely available, and the world is reopening, people are ready to shop IRL, and it shows, especially for younger female shoppers.

Females of both generations are driving the shift, with Gen Z females leading the charge, almost assuredly because having the ability to try clothing on has a major influence on whether or not they ultimately decide to purchase what's in their cart. They were also the only group with a **zero rate of Covid-related anxiety** when it came to deciding where they shopped for clothes.



Primary Shopping Location By Gender x Generation



This isn't the first time we've noticed that Gen Z, for all of their digital fluency, are increasingly opting for a bricks-over-clicks experience. We saw it when we studied [Gen Z and Alcohol](#), and we noticed it when we broke down their [holiday shopping habits](#). So we weren't surprised to see that Gen Z is making their apparel purchases offline, too.

What determines if you shop online vs in a store?

Most & Least Influential

Male Millennials:



Availability In Store (17.7%)
Ease of Returns (0%)

Female Millennials:



Trying it on (30.2%)
Ease of Returns (2.6%)

Male Gen Z:



Price (24.2%)
Ease of Returns (1.6%)

Female Gen Z:



Availability In Store (32.1%)
COVID or Crowd Anxiety (0%)





Who's Making Their Return?

The **ability to return an item** easily didn't play a very big role in whether or not shoppers from any generation chose bricks or clicks, but it was hugely influential when it came to deciding whether to purchase a specific item of clothing:

1.2%

Youth shoppers citing **"ease of return"** as a deciding factor for online vs. in-store shopping

Youth shoppers citing **"ease of return"** as "influential or very influential" in their decision to purchase clothing

70.2%



Decisions, decisions

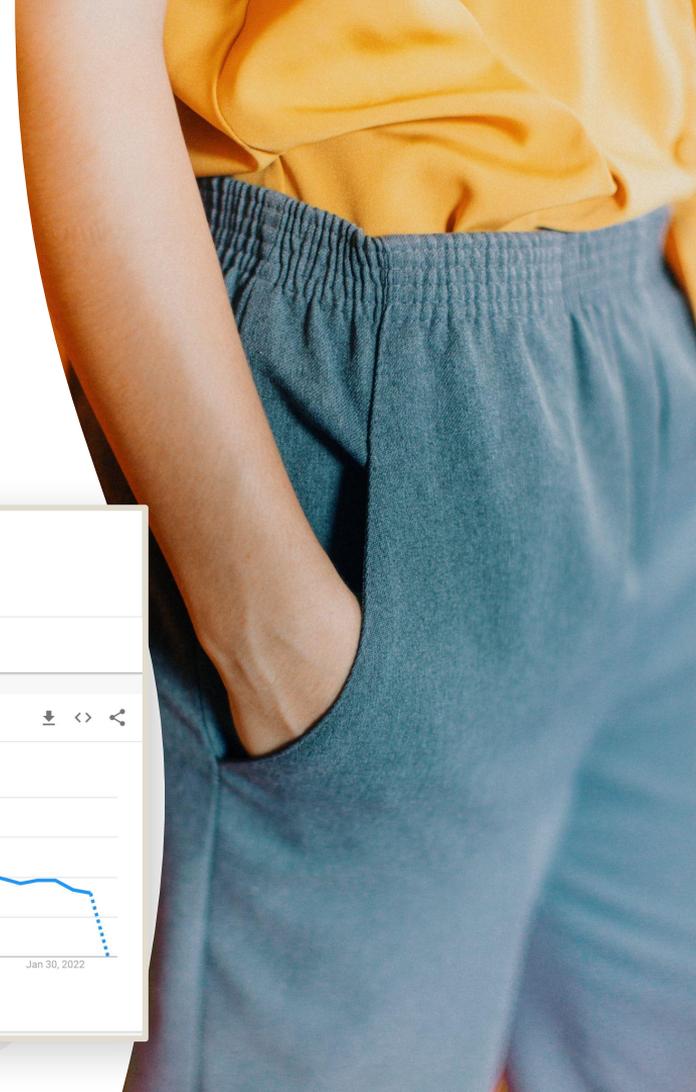
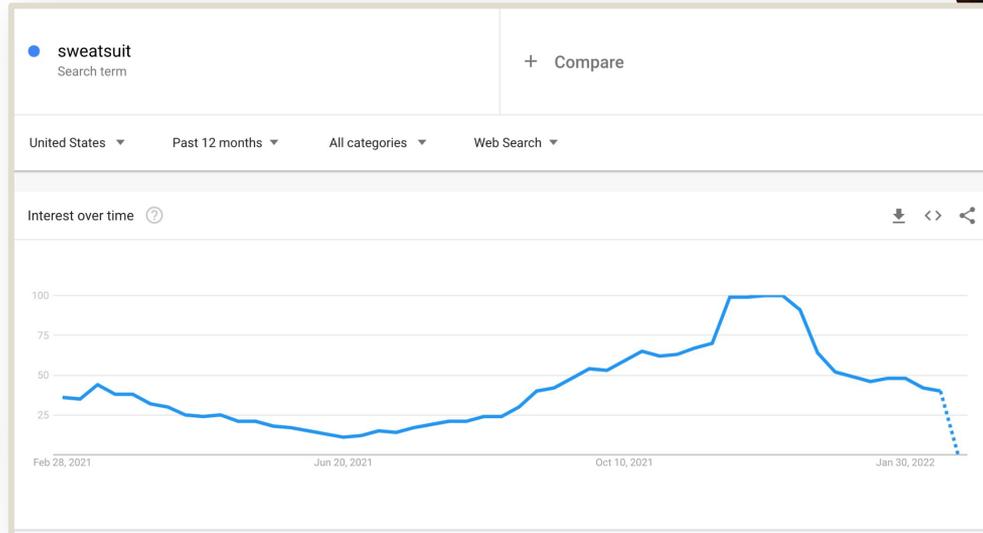
Certain categories of apparel lured shoppers out from behind their screens more than others, we found. For instance, **nearly every group opted to shop leisure wear and night out attire primarily online**, pointing to the function online shopping serves for garments at both ends of the spectrum.

Could it be that leisure wear is likely to be considered a "low stakes" purchase with lots of latitude in size and fit, while night-out attire may feel more "high stakes" and having a broader selection of clothing is helpful? It certainly seems likely.

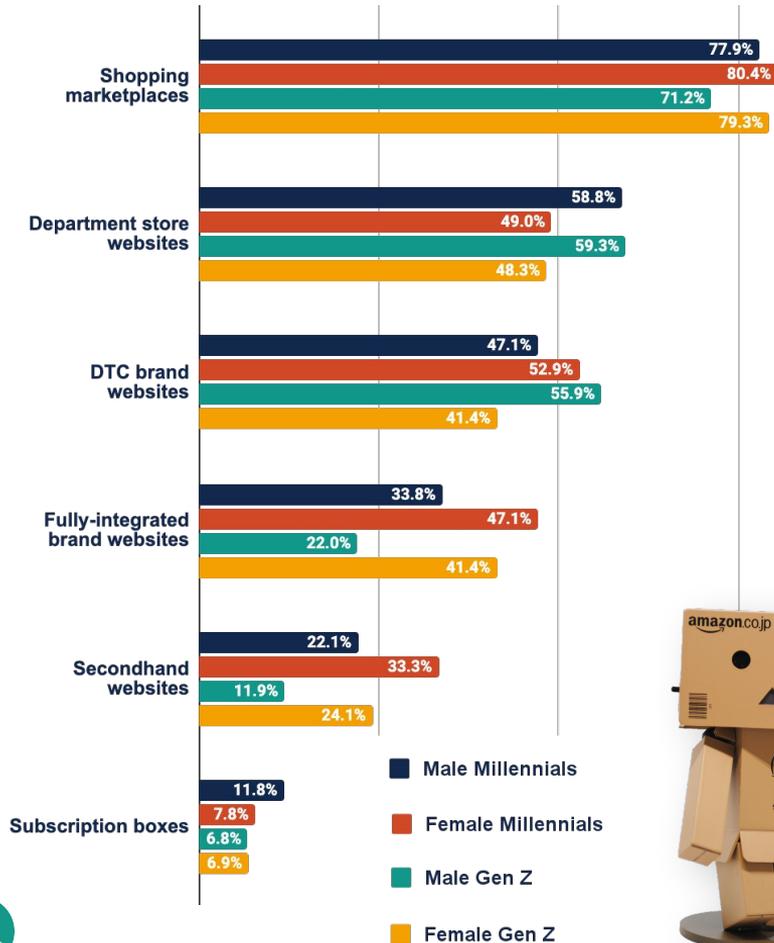


Then there are seasonal trends to consider. For instance, **Gen Z females** tend to shop for **leisure wear in stores** more frequently than any other group. That could be because leisure wear has been more "on-trend" than usual, placing more leisure wear in the same sections shoppers tend to find everyday wear.

Since we've already established that female Z's are heading to in-person locations to shop in higher numbers, it seems likely that as leisure wear and athleisure styling trends wax and wane, so will the likelihood that shoppers acquire those pieces in-store or offline.



Where Do You Shop Online By Gender x Generation



The Primacy Of Prime

We noticed some universal truths about where our shoppers logged in to load their carts. **Online marketplaces like Amazon were the top choice** for every single generation of shoppers, while subscription boxes like ThredUp were the least popular. Not all of our shoppers eschewed them completely, however: Millennial males were almost twice as likely (11.8%) to subscribe to those than any other group.

Ladies Love A Discount

We noticed that **females of both genders will put in extra legwork to find apparel on consignment and second hand sites**, and that they were more likely to shop at fully integrated brand websites. These include low-cost, fast fashion favorites like Shein, Zara, and H&M, which could certainly appeal to the established thriftier female shoppers in our study.



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Charting the Generational Buyer's Journey





Charting The Generational Buyer's Journey

One of the most compelling arguments for taking a magnifying glass to different generations' habits and attitudes is the ability to understand how they go from needing something to owning it: **the buyer's journey**. We asked our participants **what steps they took when they were shopping for clothing and accessories**, and here's what we learned:



1. Initiation



2. Discovery



3. Consideration



4. Purchase

Initiation

All of our shoppers most often initiated their buying journey when they noticed a **sale or discount** on either a piece of clothing that they wanted or from a brand that interested them. The second most influential driver?

For **Millennials**, the next most influential driver was **having a functional need** – think needing a new pair of hiking boots or outfitting a workout wardrobe after joining a newly reopened gym.

Gen Z cited an **upcoming life event** – buying a smart button-down for a job interview or an LBD for that first in-person date – as their #2 shopping trigger.

Millennial males were the least likely to initiate their shopping journey just because the paycheck hit, but most likely to hit the mall if they saw a new trend they wanted to keep up with



For about a quarter of all Gen Z shoppers, boredom was the biggest reason to begin browsing



Reasons for shopping

Generation Z

41.6%

Sale / Discount

32.2%

Life Occasion

30.2%

Seasonality

28.2%

Bored

Millennials

53%

Sale / Discount

35.4%

Functional Need

30.5%

Seasonality

26.8%

Shopping is a Hobby



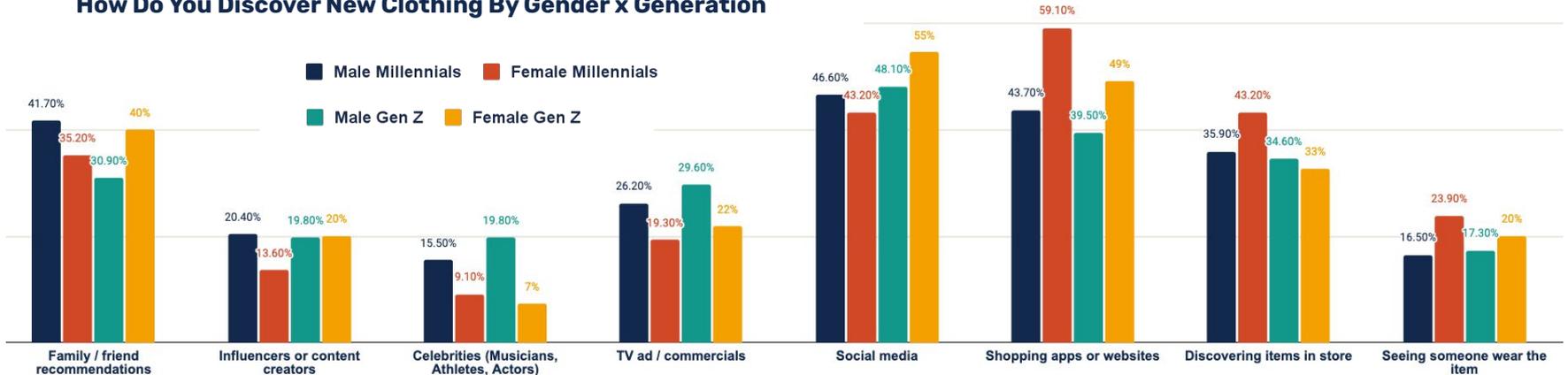
Discovery

Male Millennials and **all of our Gen Z shoppers** discovered new apparel and accessories to buy (or research further) on the **social media platforms** they were active on. Shopping apps and websites were the second most popular way each of these groups discovered something new.

In an Uno Reverso style situation, **Millennial females were the only discovery outlier**. If brands want to reach them at the discovery phase, **shopping apps and websites** are the best place to do that, and social media is the second best.



How Do You Discover New Clothing By Gender x Generation



Close-up: Social Media Discovery

Instagram was by far the most popular social media channel to discover new looks for all of our shoppers, especially for Millennial males. From there, it gets a little interesting:

Males of both generations were least likely to turn to Pinterest during the discovery phase, while Snapchat was the least popular discovery channel for females.

Top Social Channels for Clothing Discovery

	Male Millennials	Female Millennials	Male Gen Z	Female Gen Z
#1	 Instagram	 Instagram	 Instagram	 Instagram
#2	 Facebook	 TikTok	 YouTube	 TikTok
#3	 YouTube	 Facebook	 Snapchat	 YouTube



Everyday Influencers vs Instagram Incumbents

For a decade, influencers and celebrities were considered the tastemakers of social media. In 2010, **86%** of brands allocated some portion of their marketing budgets to their influencer marketing strategy. Those influencers lived on Instagram and were positioned perfectly to reach Millennial females, the site's fastest growing group of DAUs.

As of 2021, that number has dropped to anywhere from **59-75%**. Woof, huh?

Blame the Fyre Festival, the pandemic, or the #foryoupage, but just like fit-and-flare dresses and lumberjack beards, professional influencers and content creators are less influential than they were a decade ago. They've been unseated by content created by "everyday influencers" served up on algorithms that deprioritize follower count in favor of user engagement and interest, like TikTok's.

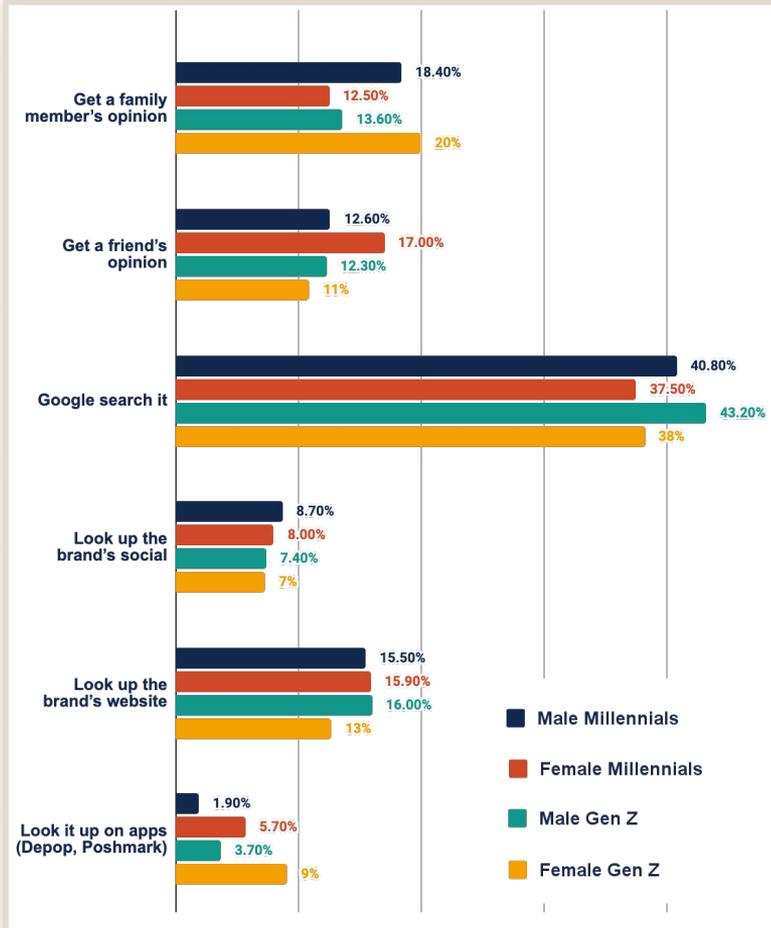
We saw the effects of this firsthand. During the discovery phase of their shopping journey, **Millennial females were the least likely to find something new via influencers (13.6%), celebrity, or professional accounts (9.1%)**. How's that for a sign of the times?



only
13.6%
of Millennial Females discover
apparel purchases through
influencers



What's the First Thing You Do When You Find An Item You Like, By Gender x Generation



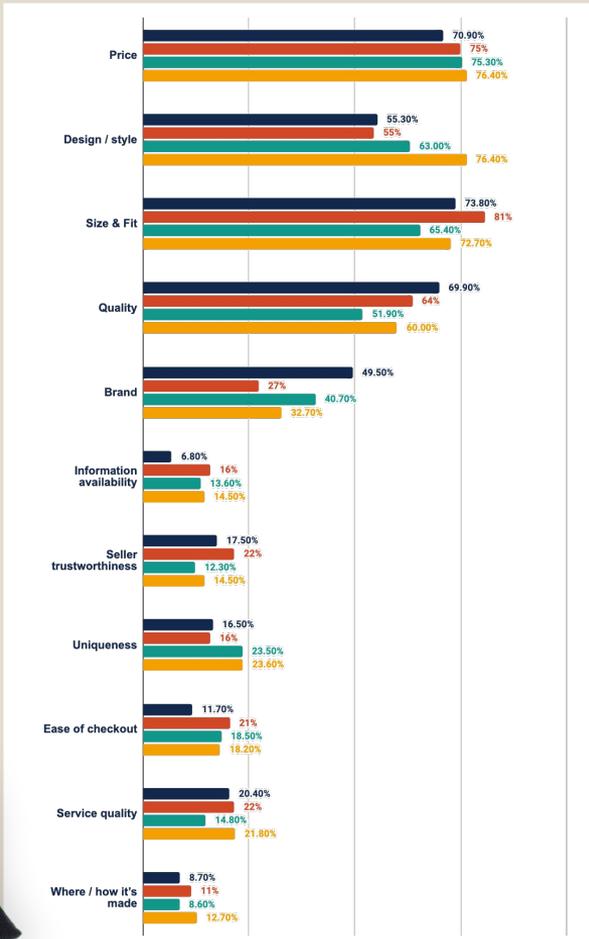
Consideration

Once that perfect piece piqued their interest, all of our shoppers' buyer's journeys converged again. The first order of business? **Turn to Google first to learn more about their new finds.** This step is like the swiss-army knife of the consideration phases. Our shoppers were looking to compare prices, see in-store availability, and peep user reviews for the clothing they wanted to buy.

From there, each group of shoppers sought out a friend or family member's opinion, headed to the brand's website, and eventually turned to the brand's social media channel for more information.



Most Important Clothing Purchase Factors By Gender x Generation



So, what’s moving Millennial and Gen Z shoppers through the consideration phase and into making a final purchasing decision?

For Millennials of both genders, **“size and fit”** topped the list – 73.8% of males and 80.7% of females cited it as a most important factor when considering an item to buy, followed closely by the **price of the item** in question (70.9% and 75%, respectively).

Millennial males were more likely than any other group to cite an **item’s quality** (68.9%), which makes sense given their propensity to spend more on clothing than any other group.

So does over indexing on size and fit for **Millennial females**, who are more likely than any other group to dress for **comfort over style** (66.1% vs. 33.9%).

For Gen Z, price was the most important factor for 75.3% of males. It was also the top factor for females – tied with design and style – at 76.4%. The second most important factor was size and fit at 66.4% and 72.7% respectively.

Finding something that was unique was much more important to Gen Z than to Millennials (23.4% to 16.2%), who were likelier to prioritize style over comfort than their older counterparts (46% vs. 39%).



Purchase

Armed with all of this information, deciding whether or not to actually buy an item varied from group to group who weighed the following factors before moving their carts through checkout:

The ability to try it on

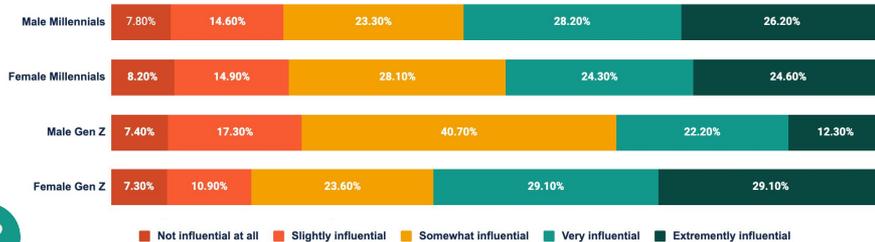
Having direct access to the clothes they're considering to purchase was very to extremely influential to at least 50% of all portions of the youth audience, except for Gen Z males.



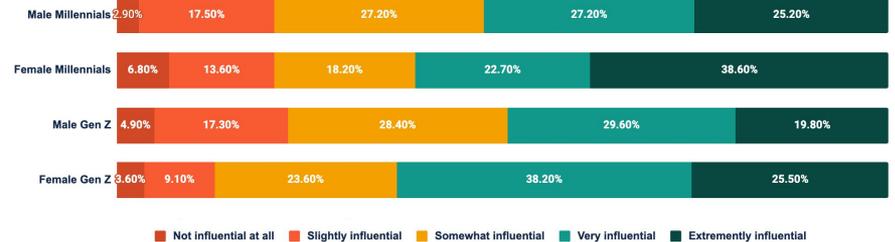
Immediate availability

When youth shoppers want a piece of clothing, they want it now, but none more so that Millennial females – who over 38% consider Immediate Availability (available in-store, or 1-2 day delivery) of clothing to be extremely important.

Importance of "Ability to Try On" on Purchase Decision



Importance of "Immediate Availability" on Purchase Decision



Ease of the return or exchange of

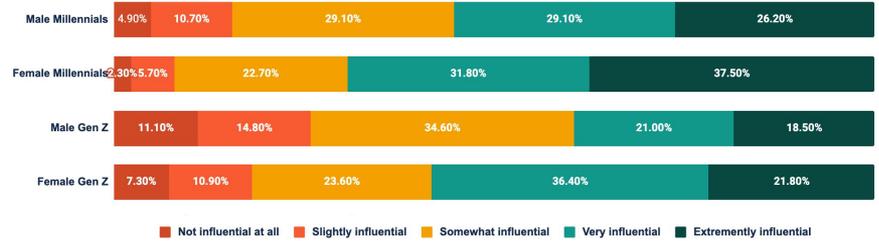
The ability to make a hassle-free return was more important to Millennials overall, but they're crucial for enticing Millennial female shoppers, nearly 40% of whom said it was "extremely influential" to their purchasing decision – the highest of any group.

Sales, discounts and promotions

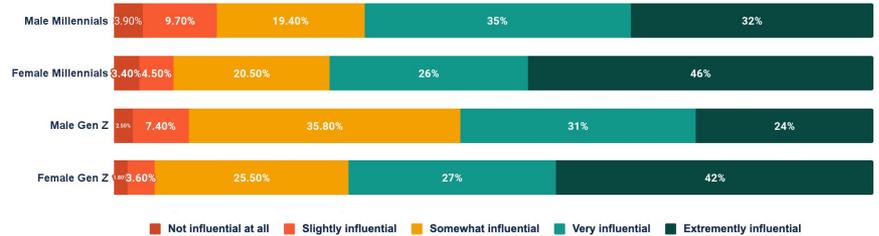
Females were more likely to consider the presence of a sale, discount, or promotion on the apparel & accessories they hoped to buy extremely influential in their decision to do so than their male counterparts. This aligns closely to the group's tendency to spend less money on clothing overall.



Importance of "Easy Returns" on Purchase Decision



Importance of "Sales & Discounts" on Purchase Decision



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Emerging Shopping Technologies

Thoughts & Opinions



We Come From The Future

Having to meet shoppers online and in-person has been the catalyst for plenty of innovation, and that includes providing experiential retail and omnichannel shopping experiences. Notably, three trends have emerged: social shopping, live shopping, and augmented reality (AR)/ virtual reality (VR) try-ons. To gauge interest in these **up-and-coming shopping enhancements**, we asked our participants to rank their interest in all of them on a scale of how likely they were to participate in each.

Social Shopping

Social shopping, also called social commerce, is the ability to purchase an item of apparel directly from social media. These immersive storefronts already exist on Instagram and more recently, TikTok, and can take shoppers from discovery to purchase in as few clicks as possible.

Gen Z females were the likeliest (41.8%) to express interest in participating in social shopping, which tracks well with their high rates of discovery on both Instagram and TikTok – 74.3% for each platform.



Likelihood to Use Social Shopping By Gender x Generation



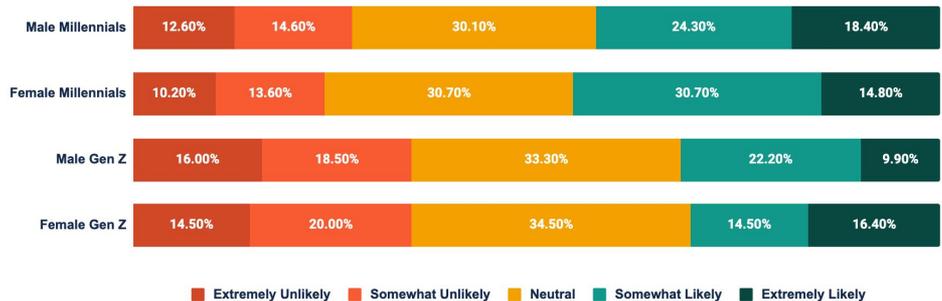


Live Shopping

Live shopping features a host – usually an influencer or celebrity – demonstrating a product or service while livestreaming. YouTube recently announced that they were already beta testing live shopping features with select content creators, allowing viewers to shop selections from creator streams.

This option was most popular with **Millennials**, who indicated their likelihood to participate at **almost 15 percentage points on average above Gen Z** – 44.1% to 31.5%.

Likelihood to Use Live Shopping,
By Gender x Generation





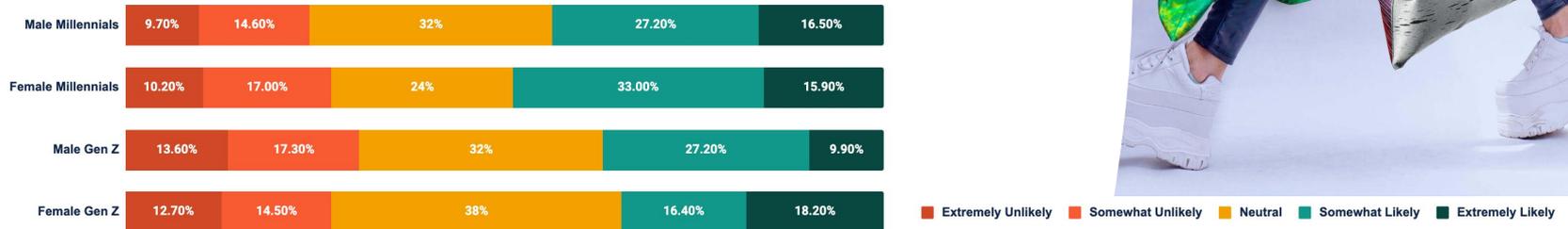
AR / VR Try-Ons

AR/VR technology hopes to allow shoppers to try everything from eyeshadow to floor lamps out before they decide to buy them, and the use case for apparel shopping is obvious – what if shoppers could try on that sweater they’re on the fence about or see if the mom jeans trend is really for them?

Millennial females and Gen Z males gravitated toward this option. We clocked the former’s interest at 48.9% – no surprise there given how frequently the data show the group’s interest in trying items on as a top purchasing influencer.

At 37.1%, Gen Z male interest was inarguably lower, but highest for the group overall, compared to social (25.9%) and live (32.1%) shopping interest. That Gen Z males could try on clothing from the comfort of their homes could draw the notoriously neutral group in where other offerings (like easy returns or instant availability) may not.

Likelihood to Use AR/VR Try-Ons By Gender x Generation



Generational Style & Wear Preferences



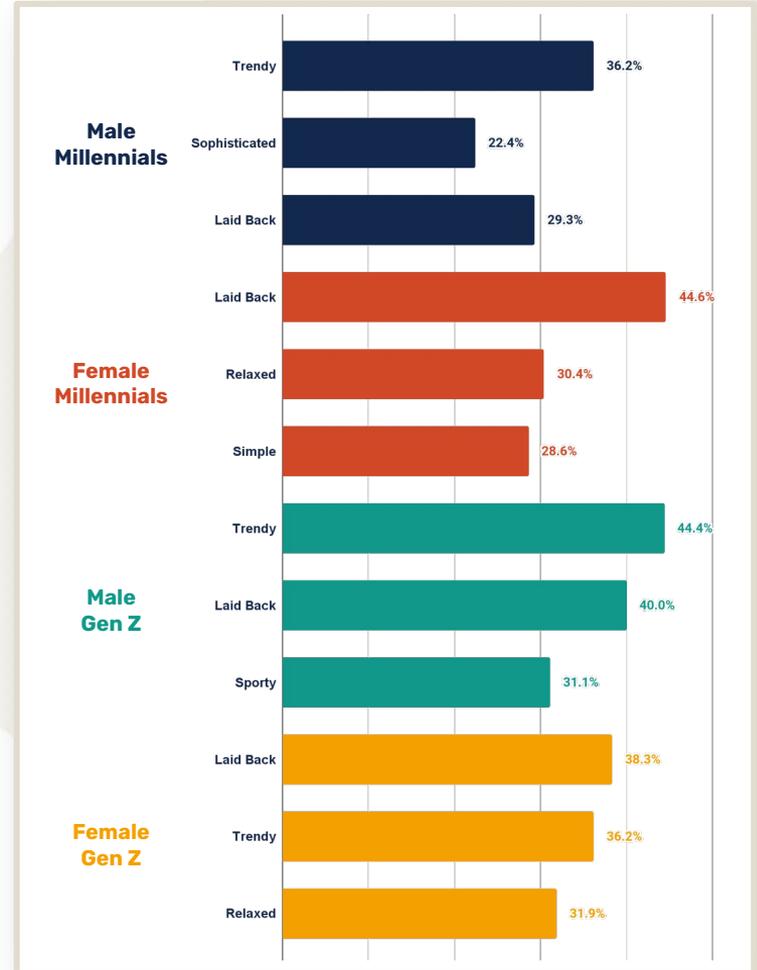
How Millennials & Gen Z Stay Stylin'

What are clothes without style? What's a wardrobe without an aesthetic? An outfit without a lewk? A 1980's Apple commercial, that's what. Add them back in, and you've got fashion, baby. And you can look that up.

We asked all of our participants to **describe their own style**. Here's what they came up with, broken out by gender:



Top Style Traits By Gender x Generation



The Trends Make The Man

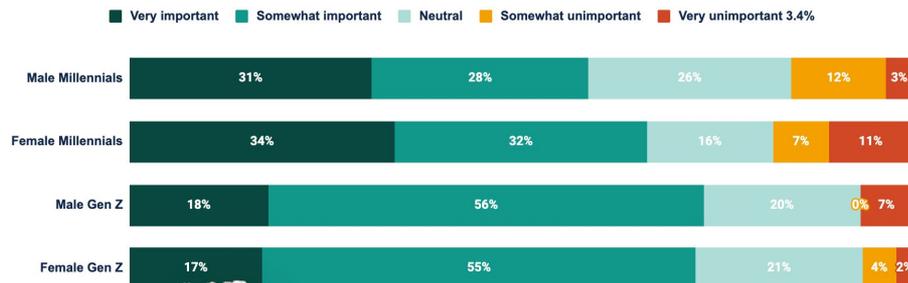
Male shoppers from both groups were more likely than their female counterparts to say that **staying on trend** was important to them (58.6% for Millennials and 73.4% for Gen Z), and both groups used the word “trendy” to describe their personal style more than any other word.

When it comes to keeping up with the latest trends, Millennial males relied on their own powers of observation while looking at what people around them were rocking over anything else to stay in vogue – 48.3%

Gen Z males, on the other hand, were happy to call in the professionals, citing observing others and **influencers/content creators** equally at 60%.

For the ladies, staying on-trend was a marginally less important, but when they wanted a finger on the pulse, female Millennials and Z’s defaulted to observing those around them most and practically equally (62.5% and 63.8%, respectively).

Importance of Staying “On Trend” By Gender x Generation



60%
of Gen Z Males look to
**influencers
& creators**
for **fashion trends**





Effortless Ensembles & Action-packed Aesthetics

All of our shopper groups chose “trendy” as a descriptor frequently enough to land the adjective in their top three style descriptors. When we removed it, we couldn’t help but notice that males were more likely to choose or write-in words that evoked action and motion – “sporty”, “edgy”, “skater”, and “rock and roll”, for instance.

Females had quite a bit more chill, evoking a sense of effortless ease in their personal style with words like “relaxed”, “modest”, “classic”, and “simple”.



In their own words

Gen Z Females:

“I really like to keep it cozy. I wear my boyfriend’s hoodies a lot.”

“Pretty simple, I guess. Just a shirt tucked into jeans, nothing crazy.”

Millennial Males:

“I really like popping on a band t-shirt. Typically a band I grew up with – something angsty, honestly.”

“I’m pretty active so will always be wearing something I can break a sweat in.”



If Clothes Could Speak

When we asked our shoppers to tell us what their clothes had to say about them, we saw trends emerge across for each generation, with Gen Z dressing to set the mood for a single day and Millennials putting their look together to express their current selves.

Each choice was the other group's runner up. From there, we saw the conversation branch off into a few different directions, depending on generational and gender breakouts:

Millennial Males:

Aspirational 34.5%

"Helps me express who I want to be in the future"

Gen Z Males:

Aspirational 40%

"Helps me express who I want to be in the future"

Millennial Females:

Distinctive 39.3%

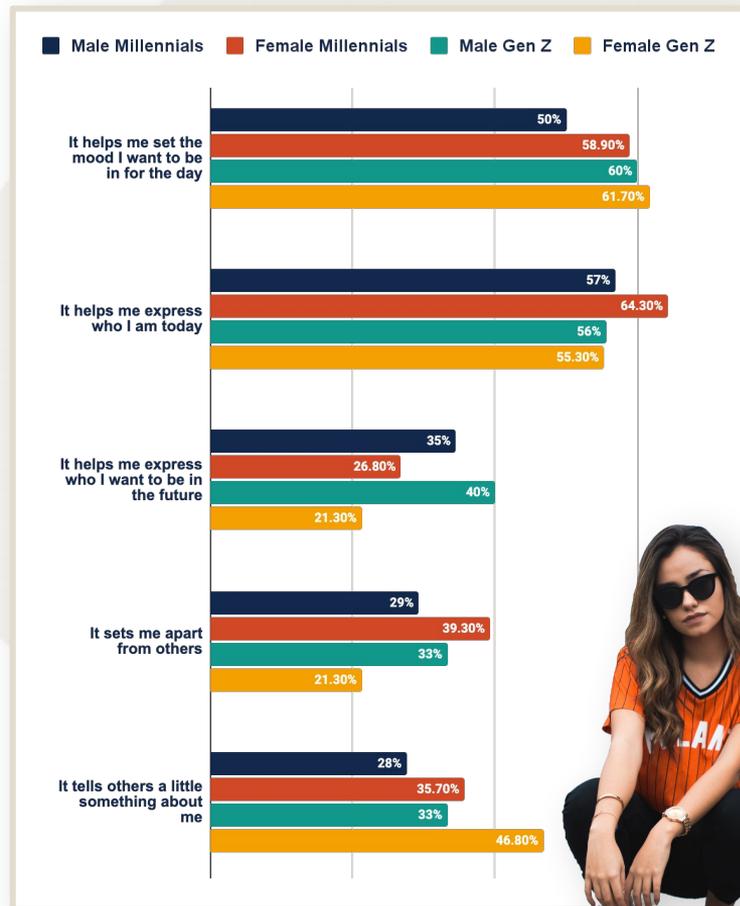
"Sets me apart from others"

Gen Z Females:

Descriptive 46.8%

"Tells others a little something about me"

What Do Your Clothes Say About You, By Gender x Generation



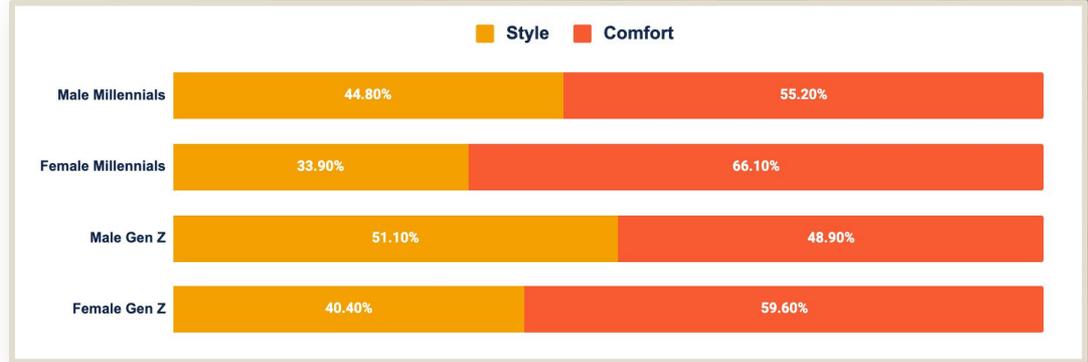
Confidently Comfortable

When it comes to the style vs. comfort debate, we saw near consensus across every shopper group, where comfort won the day. **The only outlier was Gen Z males, who said they dressed for style more than comfort.**

When we looked a little closer at this particular blip, we found that style and comfort may be two sides of the same coin for Gen Z, who were the most likely to say that they wore leisure wear every day (40%) or 3-4 times per week (53.3%) than any other group.

Hey, when sweats are in style, style your sweats, that's what we always say.

Dress for Style vs Comfort By Gender x Generation



How Often Do You Wear Leisure Wear By Gender x Generation





Know Thy Frenemy

Okay, you already know that we're not the biggest fans of pitting the generations against one another, but we had to come up with a header for this section, and we're already almost 20 headers in so you'll have to bear with us on this one. It's one thing to ask shoppers to squeeze something as personal as their own fashion aesthetic into a few adjectives and a selection of quantitative options. It's another entirely to ask them to describe someone else's.

So as a tribute to those early roast-happy headlines, we put Millennial and Gen Z perceptions to the test when we asked each generation to **describe the other's sense of style in five words or less.** 🐱🐱🐱





In their own words

How would you describe Gen Z style?

Millennials

“Odd but fun”

“They are the weirdest dressed generation”

“Unique and expressive”

“It looks so vintage.”

“More revealing and edgy”

“Trendy skimpy flashy”

“Mismatched and mixed up”

“Outrageous, like what the hell”

“Dynamic and ostentatious”

“Very eclectic to be honest”

How would you describe Millennial style?

Gen Z

“retro and old style baggy”

“Comfort, jeans, practical”

“this clothing is very vintage and simple, but also it is cute”

“Outdated, Chevron, Flowy”

“Kinda lame”

“Scarfs, uggs, skinny jeans, side part”

“Old but still fashionable”

“Simple and clean”

“retro and indy”

“There clothing style was for comfort”



Who Wears What When?

It's no surprise that what we wear was as affected by the pandemic as everything else about our clothes. For instance, you could answer the above question as:

Everyone. Sweats. All the time.

But that's starting to change. To get a better idea of how, we asked our shoppers to tell us how often they wore six categories of clothing from leisurewear to night-out attire. Here's who wears what when:

Leisurewear

Gen Z males aren't the only group that loves a good pair of cozies. Well over half of very single group said they wore leisurewear either every day or 3-4 times a week, so it's clear no one is ready to give up the pandemic uniform just yet – especially male Z's.

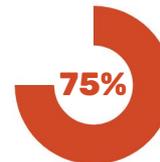


Wear Leisurewear 3 Times per Week or More

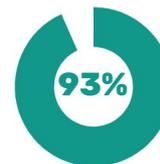
Millennial Males



Millennial Females



Gen Z Males



Gen Z Females



Goodbye, business formal

On the other hand, it seems almost no one is in a rush to return to the days of windsor-knotted ties, polyester powersuits, or ultra sheer pantyhose. When we looked at responses in the “1-2 times per month” and “rarely or never” response groups, over half for each group was clustered there.

Worth noting though, is that while most of our female respondents answered that they wore business formal “rarely or never”, **males were more likely to wear this category at least once or twice a month** – about a quarter of Millennial males and a third of Gen Z males.

Business Formal Wear Frequency By Gender x Generation





Welcome Back, Waistbands

Everyday casual is creeping back into rotation. This was the category least likely to accrue responses in the “rarely or never” option group, with affirmative answers spread relatively evenly across the first three frequencies. That means that on average, **67.6% of all of our respondents are back to wearing pants with waistbands on a weekly basis.**

The only exception here? Gen Z females. Where 30% or more of every other group said they wore casual looks – like jeans and tees – at least once a day, less than half of Gen Z females said the same, opting to dress in casual wear 3-4 times a week instead.

Everyday Casual Wear Frequency By Gender x Generation



The Night Out Is Back In, Especially For Gen Z

The world is finally reopening, and that means that for the first time in a long time, there's a reason to put on something nice – dare we even say “fancy”? – besides just clinging to whatever sanity we can. How often our shoppers did this varied pretty widely, though:

Millennial males report wearing night-out attire most often, with the majority (34.5%) dressing up 1-2 times per week. Their female counterparts, on the other hand, said they mostly went out 1-2 times a month (32.1%). They were also the group least likely to wear night-out attire, with a full 28.6% saying they wore clothing in this category rarely or never.

Gen Z males also dressed up more frequently than their female counterparts, with the majority (31.1%) dressing up 1-2 times a week, the most of any group. Gen Z females, on the other hand, were evenly split (31.9%) between a frequency of 1-2 times a week or 1-2 times a month.

Night Out Attire Wear Frequency By Gender x Generation



Youth Shoppers' Favorite Apparel & Shoe Brands



Best-Loved Brands Among Millennials & Gen Z

Brands aren't the first thing that our shoppers report considering when it comes to purchasing clothes, but it was important, making the list of top five factors, well above service quality, reviews, and where and how a garment was manufactured.

Males from both generations, in particular, **placed more importance on the brands they shop** than their female counterparts, 45.1% on average vs. 30%. We looked at each group's favorite brands to find out who they're wearing and how they're wearing them.

Then, we put together the ideal head-to-toe casual wear look for each of our respondent groups.

Importance of Brand on Clothing Purchase Decision





Most Name-Dropped Labels

There were a few brands our shoppers mentioned over and over, name-dropping them so frequently that they transcended generation and gender – and sometimes even category.



FOREVER 21



Millennial's Top Shirt Brands

These are the brands most-often mentioned when asked "What's your favorite brand of shirts?"

Male Millennials:

1. Nike (16.9%)
2. H&M (9.4%)
3. Hanes (7.5%)

Female Millennials:

4. Hanes (8.5%)
5. Aeropostale (6.3%)
6. Nike (4.2%)

Male Millennials



AÉROPOSTALE



Abercrombie & Fitch



GAP

GILDAN

PAC SUN



Female Millennials



AÉROPOSTALE



FOREVER 21

GUESS



MICHAEL KORS

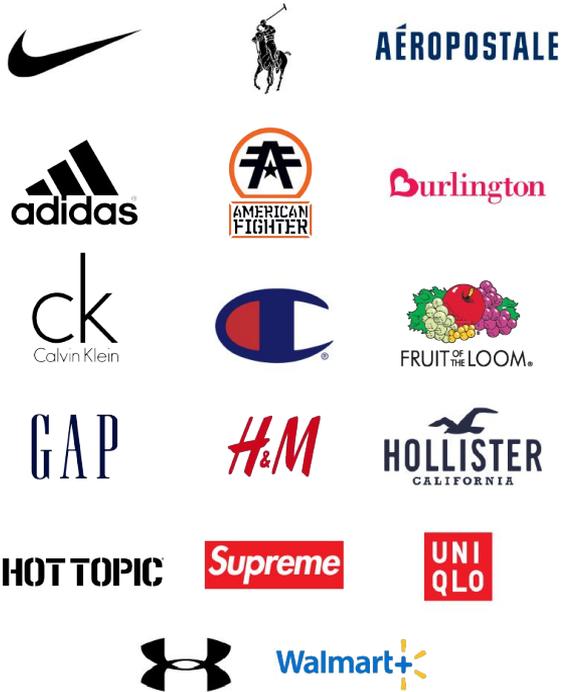
Abercrombie & Fitch



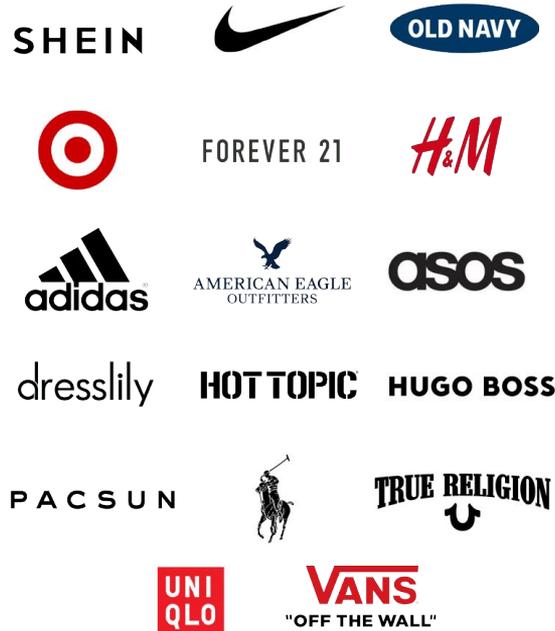
HUGO BOSS



Male Gen Z



Female Gen Z



Gen Z's Top Shirt Brands

These are the brands most-often mentioned when asked "What's your favorite brand of shirts?"

Male Gen Z:

1. Nike (29.3%)
2. Ralph Lauren (9.7%)
3. Aeropostale (4.8%)

Female Gen Z:

4. Shein (16.3%)
5. Nike (9.4%)
6. Old Navy (6.9%)

Millennial's Top Jean Brands

These are the brands most-often mentioned when asked "What's your favorite brand of jeans?"

Male Millennials:

1. Levi's (40.1%)
2. Express (5.6%)
3. Wrangler (3.7%)

Female Millennials:

4. Levi's (42.9%)
5. American Eagle (10.2%)
6. Calvin Klein (4.1%)

Male Millennials



EXPRESS

Wrangler



Female Millennials



Abercrombie
& Fitch



GUESS

KENNETH COLE



Madewell



Miss Me

TORRID



Male Gen Z



Wrangler

TRUE RELIGION



Buckle



DOCKERS

GAP

HOT TOPIC

OLD NAVY

Female Gen Z



OLD NAVY

AÉROPOSTALE

Wrangler



GAP

GUESS

H&M

LUCKY
EST. 1990
BRAND



TORRID



Gen Z's Top Jean Brands

These are the brands most-often mentioned when asked "What's your favorite brand of jeans?"

Male Gen Z:

1. Levi's (42.1%)
2. Ralph Lauren (10.5%)
3. Calvin Klein (7.9%)

Female Gen Z:

4. Levi's (32.5%)
5. American Eagle (16.3%)
6. Hollister (9.3%)

Millennial's Top Shoe Brands

These are the brands most-often mentioned when asked "What's your favorite shoe brand?"

Male Millennials:

1. Nike (57.9%)
2. Adidas (12.3%)
3. Puma (3.5%)

Female Millennials:

4. Nike (46.3%)
5. Adidas (9.3%)
6. Vans (7.4%)

Male Millennials



ALDO



COLE HAAN



GEOX



Female Millennials



Gen Z's Top Shoe Brands

These are the brands most-often mentioned when asked "What's your favorite shoe brand?"

Male Gen Z:

1. Nike (75%)
2. Adidas (9.1%)
3. Converse (4.7%)

Female Gen Z:

4. Nike (47.8%)
5. Adidas (13%)
6. Vans (8.7%)

Male Gen Z



Clarks



Rick Owens



YEEZY

Female Gen Z



boohoo



GUESS

hey dude



TOMS



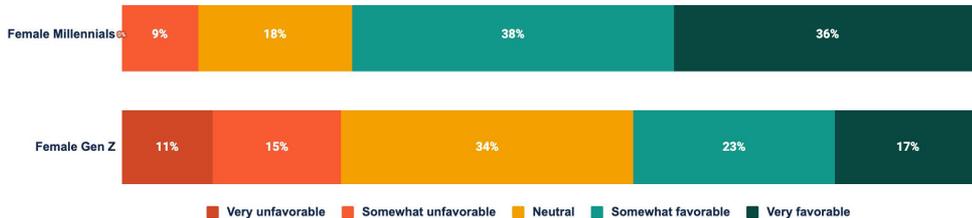
Gucci? Or Goodfellows?

Of course, not every brand is created entirely equal, is it? It's a long way from Armani to Zara, even if it's all in how we perceive them. But we're not as interested in how we, literally, perceive them. We were much more interested in how our respondents perceived the difference between apparel labels with brand recognition and private labels.

Who Keeps It In-House?

Not Gen Z females, that's for sure – especially compared to their Millennial counterparts. We noticed a pretty wide favorability gap straightaway between the two groups when it came to in-house or private label apparel brands like Amazon Basics or Wild Fable and A New Day, Target's Misses and Women's apparel brand offerings.

Private Label Brand Favorability



In their own words

What is your opinion of private label brands?

Millennials

"There's something cute in every style"

"If the style is in style it doesn't matter who makes it."

"It's cheaper but still just as fun."

Gen Z

"Some brands are good and some aren't."

"Material is not that good."

"Affordable but not ethical."



A Look At Luxury Labels

On the other end of the spectrum are the luxury brands – the ones our shoppers associate with exclusivity and quality. We found our shoppers associated one brand above all others with the “luxury” designation, no matter when they were born. Spoiler: we spoiled it for you already.

That’s a whole lot of love for Gucci, especially among Gen Z. That tracks with recent revelation that the Italian fashion house was TikTok’s favorite designer darling in 2021. While most of these top-dropped names are hardly surprises, we couldn’t help but notice that there was some latitude in which labels conjure up the image of luxury apparel and accessories for our shoppers, from mid-market to mass market favorites, and even fast fashion picks.



What’s the first brand that comes to mind when you hear “luxury apparel?”



	Male Millennials	Female Millennials	Male Gen Z	Female Gen Z
#1	 Gucci	 Gucci	 Gucci	 Gucci
#2	 Louis Vuitton	 Louis Vuitton	 Louis Vuitton	 Chanel
#3	 Ralph Lauren	 Chanel	PRADA Prada	Dior Dior



Fashion Trends: Coming or Going?





Who Wants 'Woke' Fashion?

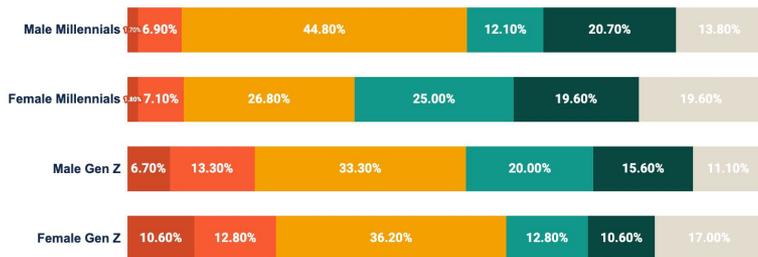
Ask anyone, and they'll tell you that Millennials and Gen Z represent a societal shift in attitudes toward inclusivity, sustainability, and social responsibility. We even have data of our own to back it up. Fashion and apparel present a unique intersection of these concepts, and since there's so much conflicting information out there, from McKinsey's prediction that "wokeness" will leave an indelible mark on the industry to Vox's insistence that Gen Z can't quit fast fashion, we couldn't resist to take a closer look ourselves.

Measuring Fast Fashion Favorability

On average, **Millennials were far less likely to perceive fast fashion unfavorably**, edged out by Gen Z by a full 13 percentage points. Once again, however, the most pronounced divide was the one between Gen Z and Millennial females. Notably, both groups have a lower relative monthly spend to their male counterparts, and that tended to surface in their opinions on fast fashion, whether their perception was unfavorable or not.

- Very unfavorable
- Somewhat unfavorable
- Neutral
- Somewhat favorable
- Very favorable
- I do not know what "fast fashion" is

What is your opinion of Fast Fashion?





In their own words

What is your opinion of Fast Fashion?

Millennials

“Very affordable compared to well known brand names.”

“Affordable, but not great quality”

Gen Z

“It's bad for the environment and bad for body image as well, but I understand for some people it's the only thing they can really afford.”

“It's lame and always changing.”

“I think we can each do our best to minimize fast fashion. However, there are people that rely on it due to pricing and we can't expect everyone to make the shift away.”

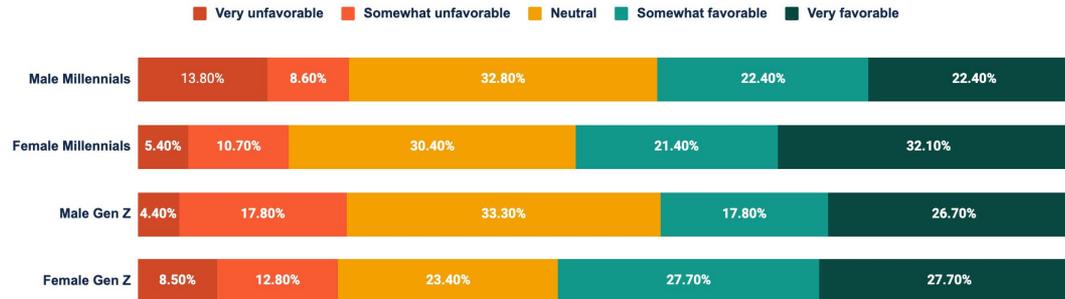


The Gender-Neutral Generational Divide

When it came to gender-neutral or genderless clothing, we found that one generation was more resistant than the others to eschewing the label when it came to their favorite labels. Millennial Males were the only group to have a “very unfavorable” response rate in the double digits – 12.4%.

Females overall had a more positive perception when it came to gender-neutral clothing, with over half of respondents in those groups reporting that they thought it was somewhat or very favorable.

What is your opinion of genderless clothing?





In their own words

What is your opinion of genderless clothing?

Male Millennials

"There should be a difference between male and female clothing."

"I think there are certain if not most items of clothing that should be associated to one specific gender and if not, at least the style."

"I don't want to see a guy in a thong."

Female Millennials

"It is great because gender norms are being questioned more every day."

"If it's comfortable, why not?"

"I think gender neutral clothing is necessary, because I could get two of the same outfit for my boy and girl in two different sizes."

Male Gen Z

"It's great! So many clothes that are patterned for women I'd love to wear, but skirts make me dysphoric."

"Boys and girls should be able to rock each other's clothes."

"I like it [because] it's literally for everyone."

Female Gen Z

"I think it is good to have more diversity and inclusivity. I think it is good for minimalist fashion."

"I love the idea of gender neutral clothing. Clothing doesn't belong to any specific gender."

"I think most of what I wear could be classified as gender neutral."



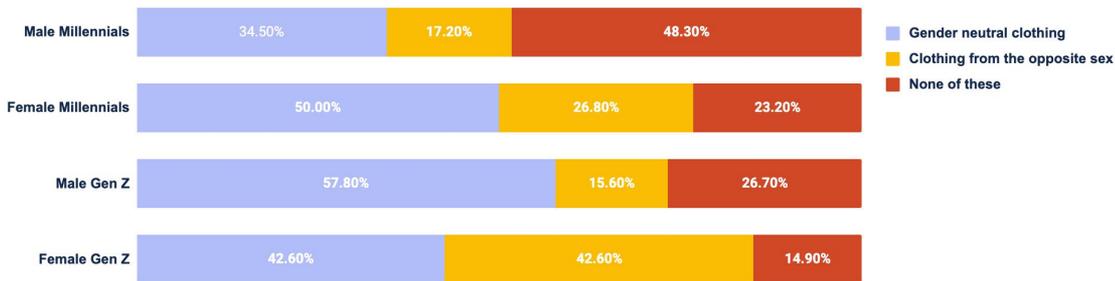


Gender-free Gen Z

57.8% of Gen Z males said that they would consider wearing gender-neutral looks – the highest of any group – and their female counterparts were as likely to consider wearing gender-neutral apparel as they were to consider wearing clothing that was specifically designed for the opposite sex – 42.6% on each count.

What's interesting here is that when we asked Gen Z how adventurous they are with their style, they were more likely (61.9%) to classify themselves as “moderately adventurous” than they were “extremely adventurous” (61.9%), suggesting that trying on gender-swapped or gender-agnostic clothing isn't something they see as particularly daring or controversial.

Which of these would you consider wearing?



The Hitlist

The spree continues! Millennials have mostly taken a break from killing things off to pass the murder mantle on to the next generation of bloodthirsty youths (they ruthlessly extinguished Brussels sprouts just last year). For a little lighthearted fun, we teamed them up to tell us what trends, styles, and garments they planned to, you know,   .

So say your final goodbyes to:



Crop Tops



Formal Wear / Suits



Tight Clothing



Bell Bottom Jeans



Luxury



Ripped Jeans



Boots



Leggings



knit

It's your move.

Gen Z & Millennials will continue to shape the fashion industry, and beyond. Are you prepared to adapt to the trends they'll drive year after year? Knit can help you keep a pulse on youth consumers so that you become a category leader and channel expert with this next generation.

Get youth consumer data for your brand.

[Contact Our Team](#)



Study Methodology

Type of Research

Custom, quick-turn quantitative and qualitative research

Level of Confidence

The total population size is 112,000,000.

The total sample size was 515 with gender and ethnicity representative of US Census data, giving us a 95% Confidence Level with a 4% margin of error.

Timing

The entire survey was fielded over a 96-hour period - Monday, January 17 through Friday, January 21, 2022.

The Methodology

An online survey used a combination of quantitative and qualitative questions to collect feedback from a panel using a method that is PC, mobile, and tablet-friendly. The online survey focused on qualified US-based Gen Z & Millennial respondents (aged 18-40) to understand their current apparel shopping and style preferences.



Want access to all the data not included in this report?

[Contact our team](#)