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CONSUMER & BEHAVIOUR INTELLIGENCE

CONSUMER & BEHAVIOUR REPORT · 2026

The Gen-Z Fashion Consumer

How the 18–27 cohort discovers, judges, buys and resells fashion — and what their behaviour signals for the brands chasing them.

EXECUTIVE SUMMARY — FOUR HEADLINE TAKEAWAYS

01

Resale is the default lens

63% factor future resale value into a new purchase. The wardrobe is now an asset, not a sink.

02

Discovery is a person

61% discover fashion via short-form video and peers — a trusted creator beats a paid placement 2.6×.

03

Values gate the basket

57% treat sustainability and ethics as a filter, not a tie-breaker — provenance must be legible.

04

The feed is the checkout

34% of purchases now begin and end inside a social or live-shopping feed.

01 · THE LANDSCAPE

A generation that shops sideways

Gen-Z doesn't move down a funnel — they move across a feed. Value-conscious yet expression-driven, they treat resale, creators and community as the infrastructure of buying. The market framing below sizes the behaviours that matter.

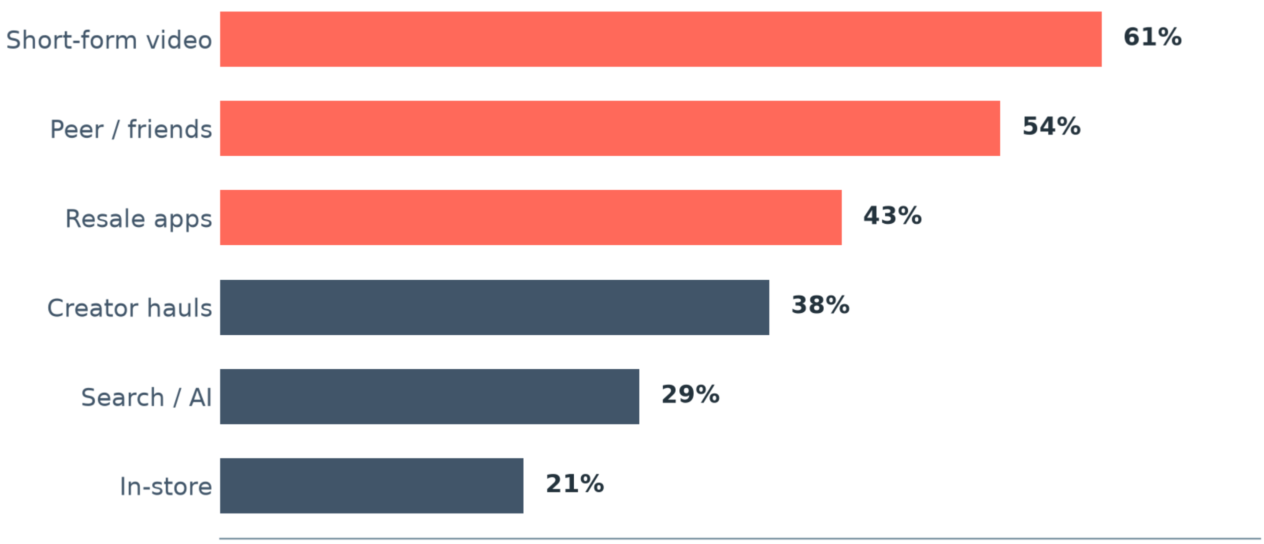
2.1bn
Global Gen-Z consumers entering peak apparel-spend years by 2026

€4.2k
Median annual fashion & beauty spend per active Gen-Z shopper

3.4×
Resale market growth vs. primary apparel since 2022

Where Gen-Z discovers fashion

Share citing each as a primary discovery channel · multi-select · sample data



Short-form video and peer networks dominate the top of the journey, while resale apps now out-rank creator hauls as a discovery surface in their own right. Traditional in-store discovery trails at 21% — not dead, but demoted to a confirmation step rather than a starting point.

02 · THE PEOPLE

Four ways to be Gen-Z

One cohort, four operating systems. Each persona buys, judges and signals differently — a single message rarely lands across all four.

MAYA THE RESALE NATIVE

DEMOGRAPHIC	23 · Urban · Student + gig work
VALUES	Circularity, thrift-as-flex, individuality
BEHAVIOURS	Sells to buy · Depop-first · haul-averse

“If it can’t be resold, I’m not buying it new.”

LEO THE DROP CHASER

DEMOGRAPHIC	20 · Suburban · Part-time retail
VALUES	Hype, status, timing, in-group signals
BEHAVIOURS	Notifications on · queues digitally · flips

“The drop is the event. Owning it is secondary.”

AISHA THE VALUES AUDITOR

DEMOGRAPHIC	26 · Metro · Early-career creative
VALUES	Ethics, transparency, durability, provenance
BEHAVIOURS	Reads labels · checks sourcing · buys less

“Show me the supply chain or lose my basket.”

KENJI THE FEED STYLIST

DEMOGRAPHIC	22 · Online-first · Micro-creator
VALUES	Self-expression, aesthetic coherence, reach
BEHAVIOURS	Content-led buys · live-shops · tags brands

“My wardrobe is a content pipeline, not a closet.”

03 · THE JOURNEY

From feed to advocacy

The path is a loop, not a line: every purchase ends by generating the next person's awareness — as restyled content and as resale supply.

01
Awareness
Short-form video + peer feeds. First touch is a person, not an ad.

→

02
Consideration
Resale check, reviews, comment-section vetting, price-tracking.

→

03
Purchase
Live-shop, DTC app or resale app. Fast, mobile, social-proofed.

→

04
Advocacy
Restyle, tag, resell. The purchase becomes new content + supply.

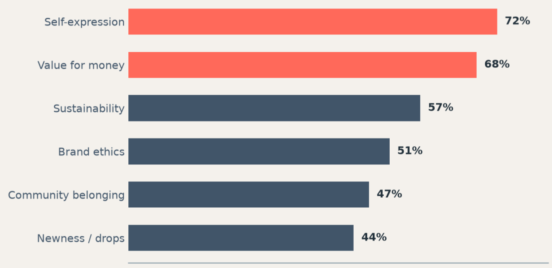
What actually drives the buy

Self-expression and value-for-money lead motivations, but sustainability and ethics have climbed into the deciding tier — no longer a soft preference but a screening criterion for a majority of the cohort.

Community belonging and the thrill of newness round out the set: brands that serve identity *and* price *and* proof win the consideration set.

Values & motivations

Share rating each "very important" · sample data



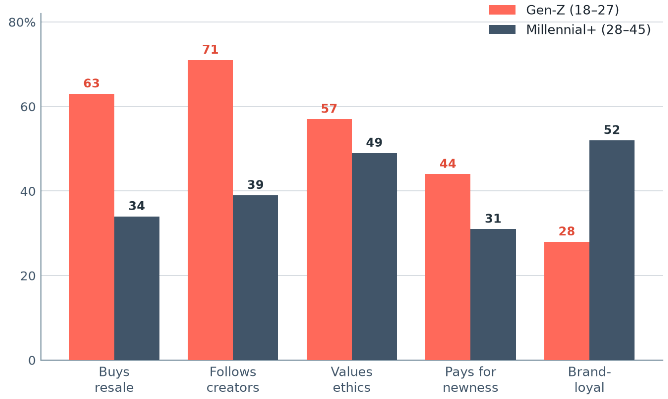
04 · THE DIFFERENCE

Not just younger — wired differently

Against older cohorts, Gen-Z over-indexes hard on resale, creators and ethics, and under-indexes on brand loyalty. The behavioural gap is widest exactly where legacy playbooks assume stability.

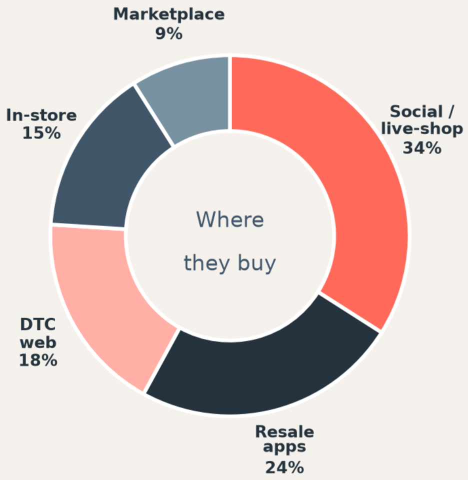
Gen-Z vs. Millennial+ behaviour

Share exhibiting each behaviour · sample data



Channel behaviour

Share of purchases by channel



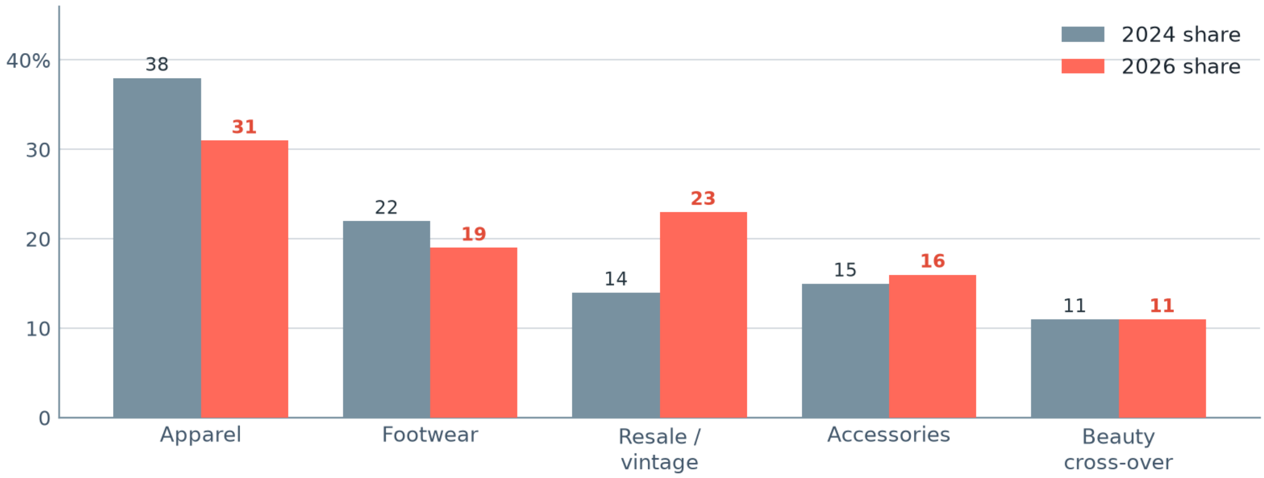
The loyalty inversion is the headline: only 28% of Gen-Z describe themselves as brand-loyal versus 52% of Millennial+ shoppers. Retention now comes from continuous relevance — drops, community and values — rather than habit. Social and live-shopping already command a third of purchases, with resale apps a fast-closing second.

05 · THE OUTLOOK

Where the spend is moving

Spend share by category, 2024 → 2026

Share of category wallet · sample data



Emerging shifts

Resale-first mindset

New-with-tags is judged by its future resale value.

Creators > campaigns

A trusted micro-creator outperforms a paid placement 2.6×.

Values as filter

Ethics and provenance now gate the basket, not just flavour it.

Live & social commerce

Discovery, decision and checkout collapse into one feed.

What it means for brands

01 **Design for the second owner**

Build durability, modularity and provenance in — resale value is a purchase driver, not an afterthought.

02 **Seed creators, not ads**

Shift budget from campaign gloss-leaders to sustained micro-creator relationships.

03 **Make ethics legible**

Surface sourcing and impact at the point of decision — proof, not slogans.

04 **Own the social checkout**

Treat live and in-feed commerce as a primary channel, not an experiment.