

WHAT GEN Z AND THEIR FRIENDS ARE SAYING ABOUT FASHION – INSIGHTS FROM SOCIAL DATA

A Synthesio Report

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The fashion industry has undergone significant disruption over the past few years. From “[converging](#)” – and emerging - channels, COVID and supply chain disruption, to the rising impact of social media platforms like Instagram and TikTok, it’s never been more important for brands to keep up with evolving consumer perceptions and demands.

Plus, Gen Z has presented new challenges and opportunities for brands: the younger, “woke” generation tends to buy from companies that align with their values. [A survey conducted in 2021](#) by Ipsos showed that 59% of the generation “strongly agree” or “agree” with the statement that companies should take a stand on social issues. They’re also the biggest users of social media and frequent their favorite sites to share opinions, follow influencers, and discover new brands.

To understand what online consumers are saying about the latest fashion trends, we analyzed 3.4 million online, English only mentions in the US, UK, and France using Synthesio’s AI-enabled consumer intelligence platform. Later in the paper, we dig into audience analysis data to reveal key brand and behavioral insights about Gen Z.

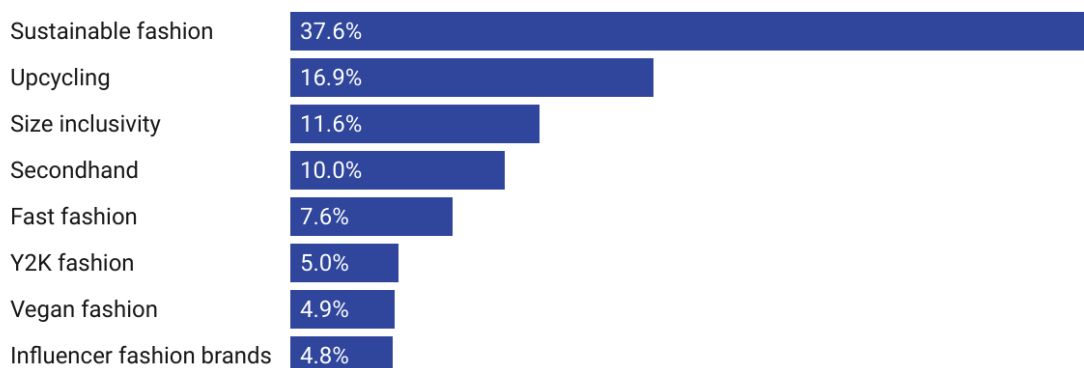
SUSTAINABLE FASHION IS THE MOST TALKED-ABOUT TREND, FOLLOWED BY UPCYCLING

Many online consumers have taken to social media to express concern over the entire fashion industry’s impact on the environment, from textile waste to pollution and CO2 emissions. Climate change, which an [average of 18%](#) in the US, UK, and France say is a top issue facing their country, is among the top expressions associated with negative sentiment in fashion-related conversations.

As a result, sustainable brands, alternatives, and shopping behaviors are top of mind for social media users. Over the past two years, sustainable fashion comprised 37.6% of fashion-related conversations in the three countries, while upcycling contributed 16.9%. In the last 12 months alone, the volume of sustainable fashion mentions has increased by an average of 13%, with the greatest increase in the UK (16%).

Figure 1 Eight popular fashion trends by percentage of total conversation volume

Fashion trends by conversation volume

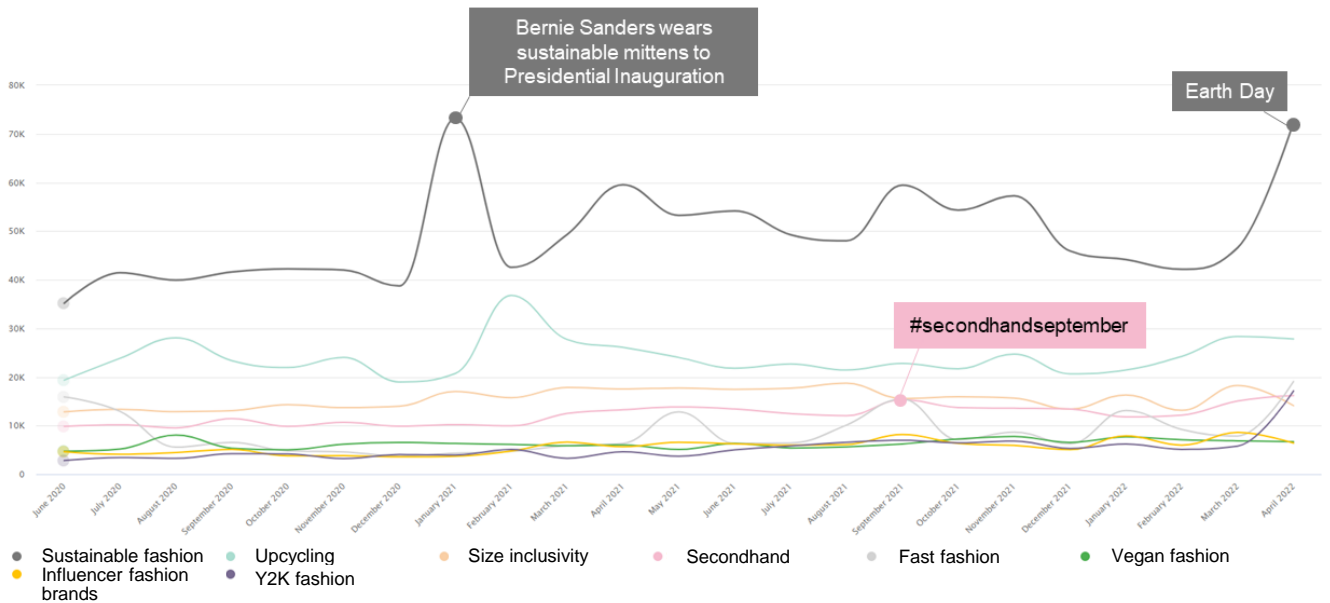


Created with Datawrapper

Source: Synthesio, 05/24/2020 – 05/24/2022, public mentions in the US, UK, and France related to fashion trends, English only

Increasingly, public figures are shining a spotlight on sustainable fashion. A photo of Bernie Sanders at the 2021 US Presidential Inauguration spiked conversation volumes when @voguerunway posted that his iconic mittens were created from repurposed wool from sweaters and lined with fleece made from recycled plastic bottles. The post amassed more than 51,000 likes and comments from users including one that reads, “hoping it starts a trend for sustainable apparel.” Celebrities like Camila Cabello have also drawn attention to the subject with her Met Gala look, as did Brazilian soccer player Neymar’s partnership with Superdry that used the hashtag #sustainablefashion.

Figure 2 Viral moments and events generate spikes in fashion trend conversations



Source: Synthesio, 06/01/2020 – 04/30/2022, public mentions in the US, UK, and France related to fashion trends, English only



... she made them from repurposed wool from sweaters and later lined them with fleece made from recycled plastic bottles.



... excited to keep exploring fashion and how it intersects with sustainability, ethics, and the environment!

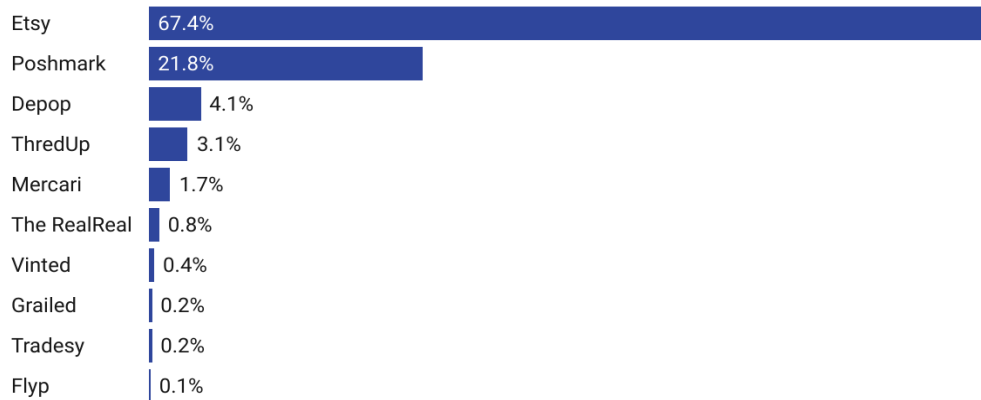


SECONDHAND, UPCYCLING, AND THRIFTING HAVE INCREASED THE POPULARITY OF ONLINE FASHION MARKETPLACES LIKE POSHMARK AND DEPOP

The top hashtags in online conversations related to fashion include #shopmycloset, #etsy, #poshmark, #gentlyused, and #sustainability. Thanks in part to TikTok, secondhand shopping and thrifting have become trendy – particularly among younger generations. #thrifting now has over 4 billion views on TikTok with creators sharing their latest thrift shop finds, and mentions of ThredUp – an online consignment and thrift store – have increased by 151%. Meanwhile, influencers are increasingly selling their secondhand clothing on marketplace platforms. In the last 3 months alone, Poshmark mentions have increased by 96%. Depop, a peer-to-peer social e-commerce company that was acquired by Etsy, has also seen a 42% increase in mentions.

Figure 3 Online fashion marketplaces and thrift stores by percentage of total conversation volume over the last 2 years

Top online marketplaces by conversation volume



Created with Datawrapper

Source: Synthesio, 05/24/2020 – 05/24/2022, public mentions in the US, UK, and France related to fashion trends, English only



WHAT'S TRENDING: NOT FOLLOWING FAST FASHION TRENDS

Online conversations about fast fashion have increased by 52% over the last 12 months - and negative sentiment related to the topic has steadily risen. The cheap, trendy clothing is under the microscope in social media conversations, not only because of its impact on the environment, but because of fast fashion brands' treatment of workers.

Synthesio Topic Modeling scanned and categorized 600k mentions related to fashion trends to reveal the top themes on consumers' minds. The largest cluster, making up 9.9% of the study, was "overconsumption of fast fashion." The mentions reveal that many put the blame on brands for consistently pushing new fast fashion trends - and making consumers feel like they must always buy new clothes to keep up.

Figure 4 Top conversation clusters identified by Synthesio Topic Modeling



Source: Synthesio, 05/24/2020 – 05/24/2022, public mentions in the US, UK, and France related to fashion trends, English only

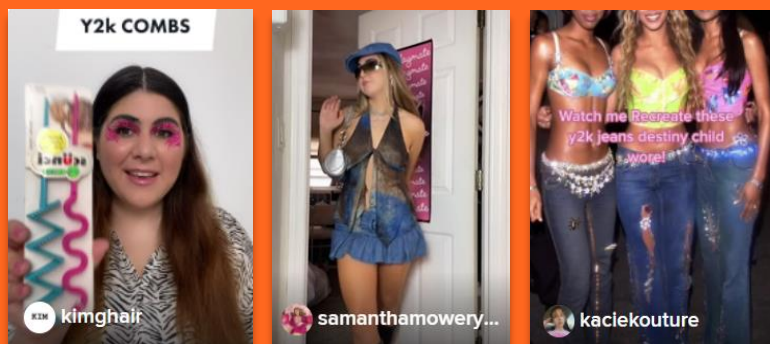
"I really hope we can cancel trends one day 🌍👕👖 The fashion trend cycle has gotten so fast that most people can't even keep up with it anymore. Before fast fashion started booming, most brands created a few collections each year. Now, clothing brands operate in 52 micro-seasons per year, and we're being sold a brand new aesthetic every week. Fast fashion isn't fashion, it's just mass produced trends and stolen designs from small artists 😞"

"I feel like so many of y'all have forgotten just about a decade ago when paying \$20 for a t shirt and \$50-80 for jeans was...normal. Fast fashion is a RECENT phenomenon, it literally used to be a SCANDAL when we heard brands were using sweatshop labor. And y'all forgot."

"today is a good day to quit fast fashion."

TREND SPOTLIGHT: Y2K FASHION

One trend that's still going strong is a blast from the past: Y2K. Online mentions about Y2K fashion have increased by 82% over the past 12 months, and #Y2K now has over 6.2 billion views on TikTok, featuring chunky sneakers, flare jeans, cropped shirts, and velour tracksuits. Brands like Urban Outfitters are generating social buzz with posts that feature new Y2K collections.



IS THE INTERNET BLAMING GEN Z FOR FAST FASHION?

While TikTok clothing hauls are on the rise – and rack up millions of views – many creators have come under fire for promoting fast fashion by working with brands like SHEIN. Users on Instagram, Twitter, and Facebook are blaming creators on the app for not only endorsing fast fashion brands but contributing to “rapid consumerism.”

“YEAH i hate how fast fashion has gone even crazier because all these tiktok girls have to buy 20 pieces of clothing per week so they have something to do like how are you not on an episode of hoarders already.”

“idk how to explain but tiktok is making people switch up styles and aesthetics so quickly, and as a result leading to rapid consumerism. they are literally the fast fashion structure. buy it when it's cute and “alt” (ew) and then dump it and repeat cycle.”

But Gen Z's influence isn't the only reason people are still shopping for fast fashion: many online feel like sustainable fashion is too expensive for the masses.

“it's so exhausting seeing a woman on TikTok lecturing people about fast fashion while wearing a \$150 sports bra. like ma'am I would love to be able to shop at those expensive sustainable stores but you & I aren't even in the same tax bracket so pls stop yelling at me“

“Say what y'all want about SHEIN but until sustainable fashion becomes more affordable y'all can't be yelling at people for shopping there.”

TREND SPOTLIGHT: DIGITAL FASHION AND NFTS

Online conversations about digital fashion have increased slightly over the last 12 months, while mentions of fashion NFTs have surged by 1,392% compared to the previous year. Nike, Gucci, Adidas, Dolce & Gabbana, and Louis Vuitton are among the most talked-about brands in fashion NFT conversations. While some are interested in experimenting, including YouTube influencer Safiya Nygaard whose viral video “I Wore Digital Clothes For A Week” generated over 4 million views and 7k comments, most are simply confused.

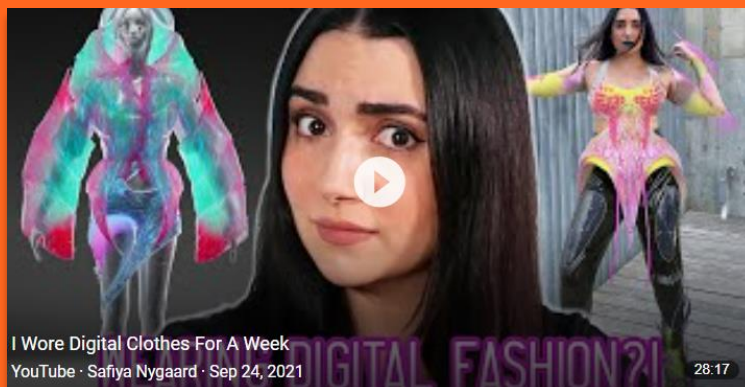
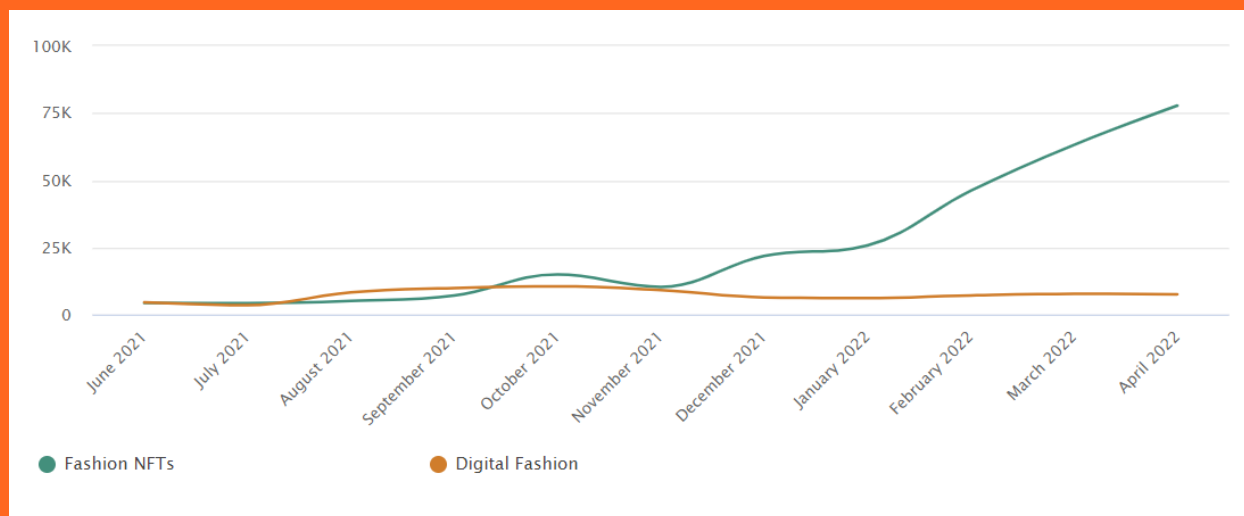


Figure 5 Volume of fashion NFT-related conversations



Source: Synthesio, 06/01/2021 – 04/30/2022, public mentions in the US, UK, and France related to fashion trends, English only

“I can’t believe we’ve actually arrived at ‘digital clothes for your Internet persona because what you seem like on social media is so much more important than real life’ stage of dystopia already.”

“I think my issue is that it’s paying for a picture when in the reality you don’t have that outfit or clothing piece, you don’t own it, which feels like we’re playing even more into what can you show off online to give the illusion you have more.”

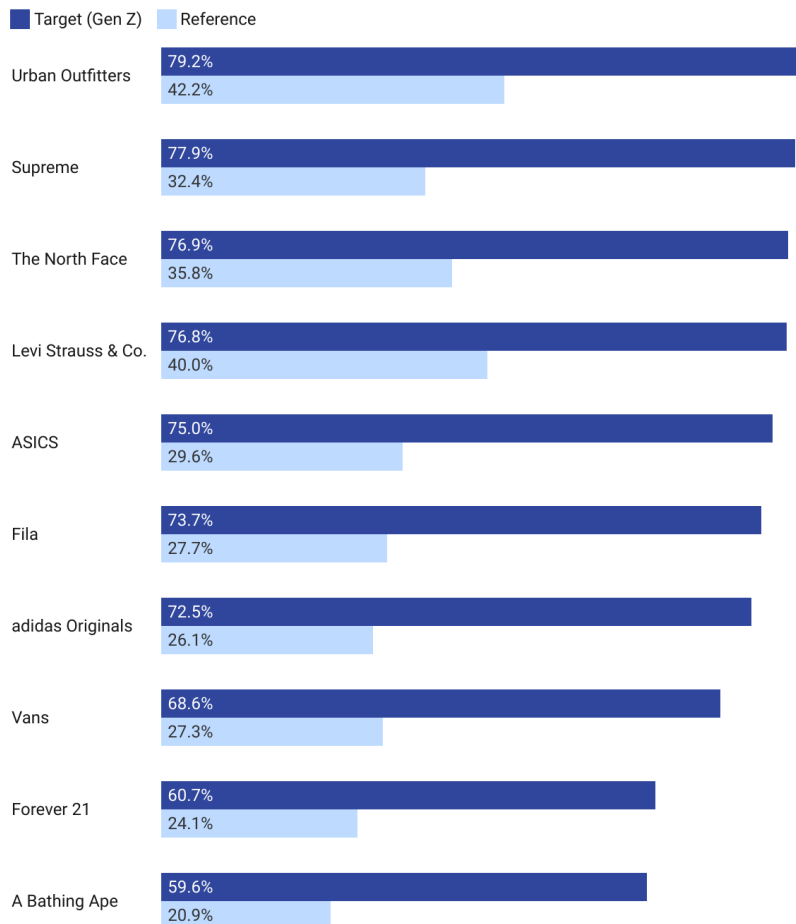
A DEEPER LOOK AT GEN Z

To learn more about Gen Z fashion lovers, we used Synthesio Profiler - an audience analysis tool that harnesses data from Meta, the world's largest behavioral dataset. Profiler uncovers key affinities to provide a 360-view of specified audience segments, including sociodemographic characteristics, hobbies and interests, online behavior, and more. We compared the target audience of 13 to 25-year-old US individuals interested in fashion to a reference audience of 26 to 65+-year-old US individuals also interested in fashion to understand the nuances of the younger generation. Here are 5 things we learned:

1. Compared to the reference audience, the fashion-engaged Gen Z audience skews female (62.2% vs. 50%).
2. Gen Z is overrepresented on social media sites like Twitch, Tumblr, and TikTok, but underrepresented on Twitter, Facebook, and YouTube. The two audiences have a nearly equal affinity for Instagram.
3. Gen Z fashion lovers have a significantly higher affinity for brands like Urban Outfitters, Supreme, The North Face, and Levi Strauss & Co. They also show a higher affinity for some luxury brands including Vivienne Westwood, French fashion house Kenzo, and luxury retailer Neiman Marcus.

Figure 6 Top brands for which US individuals ages 13-25 with an interest in fashion have a higher affinity score compared to the reference audience (excludes luxury brands)

Fashion-engaged Gen Z vs. reference audience by brand

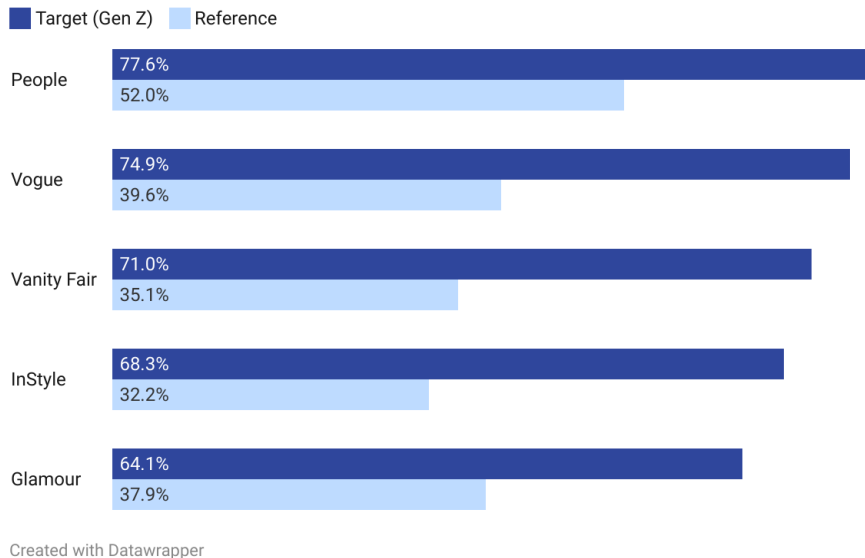


Created with Datawrapper

- In terms of media consumption, the fashion-engaged Gen Z audience has a significantly higher affinity for popular fashion magazines including People, Vogue, Vanity Fair, InStyle, and Glamour. They're also fans of Highsnobiety, a German-based streetwear blog, media brand, and production agency (19.5% vs. 7.6%).

Figure 7 Top magazine publications for which US individuals ages 13-25 with an interest in fashion have a higher affinity score compared to the reference audience

Fashion-engaged Gen Z vs. reference audience by magazine publication



Source: Synthesio Profiler

- Compared to the reference audience, Gen Z's favorite influencers include celebrities like the Kardashians, Gigi Hadid, and Zendaya. Their favorite social media personalities include Nash Grier, a 24-year-old American who rose to fame in the early Vine days before the platform was shut down; Zoe Sugg, an English social media star known by her YouTube name "Zoella"; and Leandra Medine Cohen, an American fashion blogger who shares tips and inspiration on Instagram.

CONCLUSION

As style, shopping behaviors, and buyer expectations continue to change, brands must tune into consumer conversations. Monitoring real-time consumer feedback is crucial to riding the waves of fashion trends. To keep up, brands should:

- Use social data to track evolving and emerging trends.** Fashion trends are often incubated, spread, and discussed on social media (and this is only increasing as platforms like TikTok put the trendsetting power into the hands of consumers and influencers). Brands can augment their existing market research initiatives with social data to tap into how shoppers think, feel, and talk – and detect trend signals as they emerge.
- Improve messaging, content, campaigns based on their target audience's preferences and behaviors.** By analyzing online conversations related to a topic or trend, brands can identify which content and channels perform best – and the influencers driving adoption. Plus, audience insights can help brands position their products and make smarter media planning decisions. Whether its Gen Z or another demographic, understanding your audience's affinities is key to making consumer-centric decisions.

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About Synthesio

Synthesio, an Ipsos company, is a global leader in AI-enabled Consumer Intelligence. Our hybrid offering provides companies, brands, and agencies with the most complete, accurate, and predictive picture of their markets and buyers. Our AICI platform, powered by the most advanced natural language understanding and AI algorithms, supports the broadest set of online and offline data sources and fully leverages Ipsos' award-winning analytical frameworks. Synthesio was founded in 2006 and has offices in New York, Paris, London, Singapore, and Brussels.

Want a deeper look at the social insights we uncovered while researching for this report? Ready to see a social listening pioneer and global leader in AI-enabled consumer intelligence in action? Request a demo with our team today to learn how you can turn online conversations into critical business insights.

[Request a demo](#)