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FOOTWEAR

License Global analyzes the Gen Z fashion world to predict what businesses need to succeed with the demographic.



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23 Min Read



Doc Martens' "Wednesday" Jadon boots DR. MARTENS

At a Glance

The Trends Defining Drop Culture

How to Create Opportunities to Engage with Consumers

Defined by their fluidity between online and offline worlds, preference for personalization and demand for brand authenticity, Gen Z (accounting for around 25% of the world's population, according to Statista) is shaping trends in the fashion industry that will be felt for years to come.

Another powerful force in the [fashion world is brand licensing](#), collaboration, extension and partnership, a practice that allows intellectual property to enter a creative playground of consumer products and engage audiences in new ways.

When the two combine, the results reflect the trajectory of the modern brand licensing business, a practice driven by collections, drops, creative collaboration and fan-first products that build on the emotional connection between brand and buyer.

As companies continue to seek meaningful connections with price-savvy and tech-native Gen Z shoppers (aged between 12-25), be it through sneaker collaborations or nostalgic collections, the fashion space continues to evolve, and brands are already looking for new ways to engage with a new generation of consumers.

The Trends Defining Drop Culture

[Apparel](#) and [accessories](#) have long been categories of significant importance in both fashion and brand licensing, from the logo-slapped tees of a bygone era to the trend-led retailers of today. Apparel, in fact, still plays a crucial role in brand licensing strategy, with 58% of brand owners and agents surveyed by License Global planning to include licensed apparel in their consumer outreach programs in 2025. However, the definition of apparel and accessories is evolving as Gen Z continues to drive change within the marketplace. Brands like [Nike](#), [adidas](#) and [Vans](#) are driving significant engagement with the segment through limited-edition collaborations and exclusive product drops, creating what's commonly referred to as "drop culture." As a result, categories such as [footwear](#) have also become increasingly important in the brand licensing business, rising through the ranks of priorities to gain 29% of intent from brand owners and agents building licensing programs in 2025 according to our survey data.

Related: The Top Global Licensors Report 2024

However, with Gen Z's distinct preferences, categories within fashion are rapidly expanding and no longer fit within the traditional boundaries of "apparel." Athleisure, and particularly sports and streetwear, are increasingly

Related: Keeping up with Fashion Licensing Trends

Nostalgia and music, two more significant verticals within the licensing and fashion markets, have once again found their footing with the Gen Z tribe as they continue to look for comfort and community-led connections with brands.

Licensed T-shirts featuring “retro” brands such as pre-social worlds like “Friends” and “Sex and the City,” Y2K styles or music from the ‘90s is a significant escape for Gen Z. 42% of Gen Z listen to music to escape from reality according to GWI, while 37% feel nostalgic for the ‘90s – even though the generational window stretches from 1997-2006.

GWI continues to note that, while most of the generation was either very young or non-existent in the ‘90s, it’s more about “vibe” than experience. The care-free halcyon days of the 1990s are a big draw for the market and something we see coming through in the brands and styles they engage with movies (71%) and music (64%) are the main drivers for that sense of nostalgia with Gen Z, leading to fashion trends such as ‘90s hip-hop T-shirts, low-rise and baggy jeans.

Regarding [retail](#), “omnicommerce” is a prevailing trend. Gen Z is increasingly snubbing mainstream fast fashion for vintage shopping and finding old brands, looks and licensed goods within flea markets, vintage shops and circular platforms such as Vinted. According to Drapers, while the Gen Z market often switches between online, app and in-store, physical store locations are the leading preference for fashion shopping. More than half of Gen Z fashion shoppers in the U.K. surveyed by Drapers (53%) chose physical brick-and-mortar stores as their number one shopping channel in 2023 while online shopping fell from 45% in 2022 to 35% in 2023. This is linked to the revival of physical retail following the lockdown and the introduction of digital-native brands onto the high street, such as Gymshark, Lounge Underwear and the experimental pop-up stores of [SHEIN](#).

What’s more, Gen Z is seemingly immune to brands setting the trend and more engaged with “bottom-up” trends that emerge from community, identity and confidence, such as [Barbiecore](#) or Coastal Grandma according to Business of Fashion (BoF). The BoF survey – conducted with Gen Z entrepreneurs Juv Consulting into fashion trends across the age range – showed that the leading brands that support the identity-led fashion trends of Gen Z are Nike, [Gucci](#) (the only luxury brand to appear on the top 10 list), [adidas](#), [H&M](#), [Zara](#), [Levi’s](#), [American Eagle](#), [Forever 21](#), [Urban Outfitters](#), SHEIN, Aritzia, A&F, Vans, Jordan, [Louis Vuitton](#), [Old Navy](#), [Uniqlo](#), Aerie, [Under Armour](#) and [PUMA](#).



Forever 21's "Mean Girls" collection

Brand Extensions Capturing Gen Z Attention

Gen Z, born during the late 1990s and early 2000s, has different consumer behaviors and styles than the generations before. Gen Z's tastes are traceable and specific through the influence of the digital age, and as this generation reaches adulthood, companies are pivoting to appeal to their tastes and interests. PUMA, a Gen Z favorite, spoke with License Global about the industry's challenges and how the brand continues to capture the attention of its Gen Z consumers.

"It's quite a big challenge to ensure the industry is keeping up with the constant digital evolution and the growing amount of fashion trends created by social media influencers," says Inês Vasconcelos, junior product line manager, motorsport apparel, PUMA. "The fact that so much information is available nowadays, especially online, leads to Gen Z being constantly 'thrown' into a pool of fashion ideas and influences to follow the most recent trends. At the beginning of every season, market research is mandatory to make sure PUMA is aligned with the trends our consumers are following, and our offer is taking into account their tastes. Currently, we noticed Gen Z prioritizes eco-friendly and recycled materials in every garment, to which we pay close attention by opting to use Refiber materials for our collections, for example. At the same time, oversized and comfortable but stylish fits are also heavily influencing this generation and, consequently, those fits are also implemented mostly in our lifestyle ranges."

Market research now has more active involvement from the consumer base. Trends, values, product reviews and more are often posted online, allowing PUMA and others to recognize trends and business practices

"The digital evolution has transformed the fashion industry, accelerating the pace at which trends emerge and evolve," says Brieane Olson, chief executive officer, Pacsun. "Today's consumers expect immediacy and relevance, and the key to keeping up is being able to adapt. Social media is now where trends are born and amplified, which is why we've invested heavily in digital marketing, influencer partnerships and user-generated content. At Pacsun, we are deeply engaged on platforms like TikTok, where our audience is constantly discovering new styles. The rise of e-commerce has also pushed us to innovate our digital storefronts and apps to create shopping experiences that are as seamless as possible. Retailers need to do more than just create clothes, they need to create opportunities to engage with consumers in real time, meeting them where they are and making fashion an interactive part of their lives."

"Influencers shape Gen Z's fashion by bringing authenticity, inspiration and desirability," says Ryan Immegart, chief marketing officer, Liberated Brands, operator of RVCA. "Alexis Ren is a great example. Her journey into surfing has inspired her style and ultimately lead to this collaboration. Gen Z values influencers who share real stories and lifestyles, making their fashion choices feel relatable and aspirational. The digital space has made fashion immediate and interactive. Platforms like Instagram and TikTok allow trends to spread quickly, with influencers showing how products fit into real life. For Gen Z, it's not just about following trends; it's about discovering pieces that reflect their individuality."



Gap x Cult Gaia collection

Both Pacsun and PUMA have seen success with Gen Z through their licensed collaborations.

“[Our collaboration with F1](#) has been a big success with Gen Z,” continues Olson. “The intersection of fashion and motorsport culture, combined with the excitement of events like the Austin and Las Vegas Grand Prix, speaks directly to their love for experiential trends. Another major hit has been our [collaboration with The Wild Collective for an exclusive MLB collection](#), which has tapped into Gen Z’s passion for sports and streetwear. These collaborations align with what Gen Z values most – bringing it back to authenticity, cultural relevance and a connection to the experiences that shape their world. By tapping into these cultural touchpoints, we can deliver products that capture their attention and truly resonate.”

Motorsport launches are also popular for PUMA.

“[BMW-related launches](#) are received quite well by our consumers, especially if these are connected with special dates or events,” says Vasconcelos. “For example, [the] art cars collection, both Lichtenstein and Calder, have been a great hit this year, bringing a lot of momentum to these collaborations between PUMA and [BMW](#), with exclusive pieces.

“On a wider view, the [A\\$AP Rocky x PUMA Sportstyle collaboration](#) and the first F1 lifestyle collection focused on the Gen Z consumer and young audiences are also great examples of successful product launches. The success of these might be due to their focus on the younger generations, who are heavily influenced by social media personalities and TikTok, platforms where PUMA is also very present.”

Pieces inspired by sportswear, whether athleisure or streetwear, have taken over the Gen Z fashion zeitgeist. This includes brands like Nike, adidas, New Balance, lululemon, Converse and Vans. A survey from Bernstein revealed that Gen Z buys sportswear above all other types of fashion, meaning the sports-inspired trend is here to stay.

To marry classic IP and sportswear, [Disney and lululemon recently launched a limited-edition collection](#). Inspired by archival Disney graphics, the collection features modern and elevated takes on imagery of Mickey Mouse and Minnie Mouse. The collection includes tank tops, pants, jackets, shorts, hoodies, crews, belt bags and bucket hats.

“We’re excited to partner with Disney on a limited-edition collection that is centered on celebrating joy, movement and wellbeing – values that are shared by both our brands,” says Michelle Davies, senior vice president, global community, lululemon. “Our team was inspired by archival graphics to create a collection that naturally integrates the magic of Disney with the high performance of lululemon. With the help of our ambassadors, we are delighted to bring the ‘Happily Ever Active’ spirit to our guests worldwide.”

Piper Sandler’s 2024 Generation Z survey, ranking top brands for Gen Z, found that lululemon ranked No. 3 in apparel amongst teens. The No. 1 favorite brand was Nike; New Balance was No. 3 for upper-income teens and doubled its mindshare to 8%, and for females, adidas had the most significant increase, to 14% from 3%. This data points to the sportswear trend’s upward trajectory for future trend forecasting.

ingering, and pop culture references are becoming more of a permanent fixture in many brands capturing the attention of Gen Z. Case and point: Alexis Ren, an influencer, actress, model and fitness enthusiast, is the new face of RVCA. Ren will launch a co-designed collection with RVCA next spring, leaning into all these Gen Z-grabbing trends.



PUMA's A\$AP Rocky collection

Accessory Maximalism

Apparel isn't the only kind of fashion driving Gen Z's spending. Footwear is also a huge touchpoint. In 2022, L.E.K. Consulting noted the most sought-after footwear brands for both men and women in Gen Z, with brands like [Crocs](#), [Timberland](#) and [Dr. Martens](#) cracking the top five for the casual footwear category, and Nike, Brand Jordan, Vans and adidas cracking the top five for the athletic footwear category.

These brands have also found success through licensed collaborations, with [Dr. Martens x "Wednesday,"](#) [Squishmallows x Crocs](#) and [Timberland x "Ghostbusters"](#) making recent headlines.

Also notable in fashion are accessories like jewelry, bags and belts. Like many Gen Z trends, accessories have reached Gen Z's hearts via TikTok. Jane Birkin, British-French actress and singer known to be the muse of the Birkin bag, went viral for having had an eclectic, worn look to her handbag, complete with multiple adornments. The result was what WGSN called "chaotic customization," a trend inspired by maximalist aesthetic tastes and a desire to show off favorite IPs and personality traits. Think of as many keychains, stickers, patches, bits and bobbles as possible.

Some recent launches leaning into this trend include [Claire's x Hello Kitty 50th Anniversary](#), [Sprayground x The Met](#) and [Glomesh x PAC-MAN](#).



lululemon's Disney collection

Gamifying Beauty

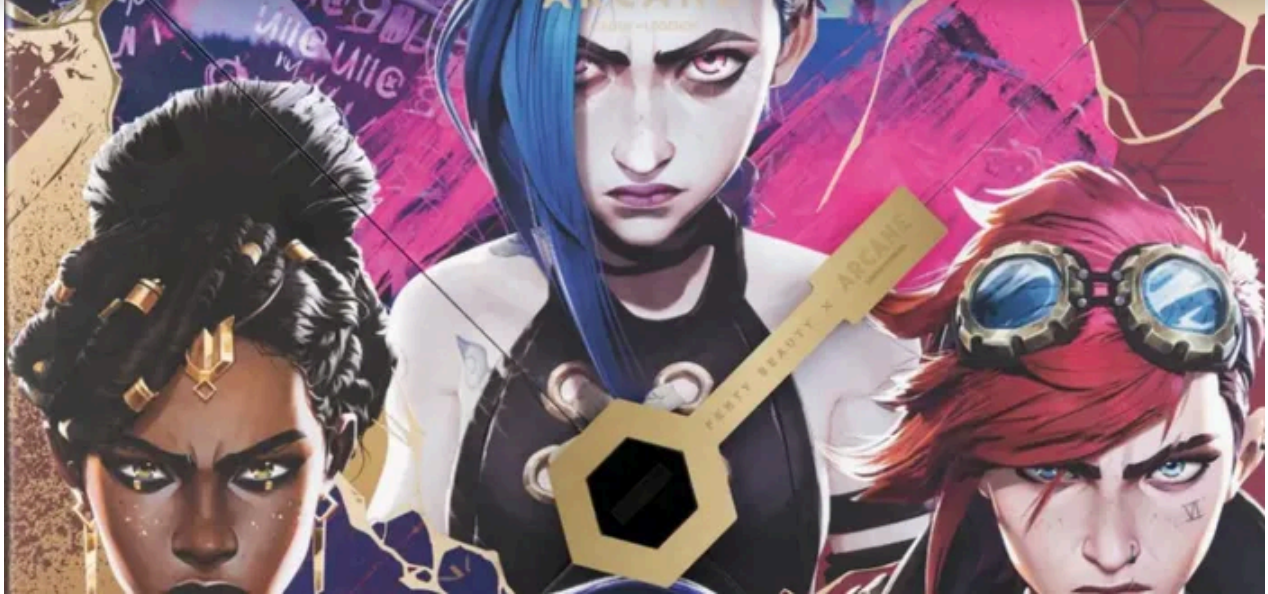
Another fashion staple for Gen Z is the cosmetics industry, with makeup used as another self-expression tool. Statista reports that Gen-Zers spend more than \$2,000 annually on beauty products.

A trend emerging in the licensed cosmetics industry is the usage of video game IP. Lab42 Market Research found that 90% of Gen Z'ers play some type of video game. They are also the most engaged generation, with 48% playing once a day or more and 29% playing for more than four hours a day. With this IP love, brands like Fenty Beauty have cashed in on Gen Z's dual appreciation for gaming and self-expression.

[Fenty Beauty recently partnered with "Arcane,"](#) Riot Games' first animated series based on the video game "League of Legends." Fenty Beauty designed each character's makeup looks seen throughout Season 2 and released a collection of limited-edition "Arcane"-inspired products for players and fans.

"Generally speaking, Gen Z loves being bold, celebrating individualism and defying the rules," says Ivory Jones, director, global consumer products, Riot Games. "Our partnership with Fenty Beauty celebrates the strong women of 'Arcane' with products for people of all skin tones."

Fenty is one of many brands following this trend. For the last few years, makeup brands have leaned into video game IP, with some highlights including Revolution Beauty launching a collection inspired by "Fortnite" in 2023 and ColourPop Cosmetics launching an "Animal Crossing" collection in 2021.



Fenty Beauty's makeup inspired by "Arcane"

The Importance of Customization

Beyond favorite IPs, Gen Z wants to reflect every part of who they are in their purchases. Whether apparel, footwear, accessories or beauty, selecting partnerships that align with Gen Z desires is a challenge, but leaning into their values is a good place to start.

This year, Edelman released a report, *Winning with Gen Z: Embracing Intention and Values for Brand Success*, that showcases what the demographic is like, and what they're looking for.

"Gen Z is opinionated and vocal, shaped by the seemingly unprecedented number of challenges facing the world today," says Amanda Edelman, chief operating officer, Edelman Gen Z Lab. "This vocalness can intimidate companies; for some, communication paralysis manifests, making it difficult for companies to commit to actions that earn and maintain the generation's trust. Yet, brands cannot afford to bury their heads in the sand. Gen Z makes up 40% of the consumer market worldwide and wields tremendous influence over every other generation, across not just what we buy but how we live and what we believe. This relationship is bidirectional, with Gen Z trusting businesses more than any other institution. Gen Z looks to brands beyond just a transactional purchase; they use brands to express who they are, connect with similar people and determine who they don't share values with."

Brands are garnering consumers by combining as many trends as they can through brand extension. Take [NASCAR](#), leaning into the sportswear and values trends by partnering with LegacyHistoryPride, a brand known for celebrating Historically Black Colleges and Universities through fashion.

"This collaboration goes beyond products – it's about amplifying, celebrating and honoring the schools that have profoundly impacted countless lives," says Tahir Murray, chief executive officer, founder,

Gen Z's innovation, mixed with their hunger for brand connection and brand familiarity, is shifting the fashion industry to be more diverse than ever. Combining vintage-inspired pieces with the effortlessness of sportswear, the influence from the digital age and a desire for the personalized, fashion brands must be willing to innovate to keep up with the newest generation with spending power.



Tyler, The Creator's Vuitton collection

Luxury Brands and Gen Z Fashion

Cerulli Associates, a market intelligence company, found through Gen Z owns only 9.4% of the total wealth in the U.S., Gen Z still spends their money on luxury items. Statista found that Gucci, Louis Vuitton and Dior were the top three brands favored by U.S. consumers in the millennial and Gen Z age groups. Luxury brand, Vivienne Westwood, resonated with nearly one-third of U.S. and U.K. Gen Z consumers. Regionally, among Asian consumers, Chanel, Hermès and Dior have retained their popularity with younger generations.

Even with the cost of living increase a hot economic topic, a recent report by Bain & Company found that Gen Z consumers will account for nearly a third of luxury purchases by 2030. Brand names are important to Gen Z, but less than past generations. Claire Tassin, retail and e-commerce analyst, Morning Consult, told Yahoo Finance that Gen Z consumers are not as brand loyal as older consumers, and luxury to them is about experience over status. The only brands this generation will stay loyal to are ones that are able to push a message that allows the brand to become part of an individual's identity. To capture a consumer and keep them, luxury fashion brands are now selling a lifestyle above all else.

Another way brands capture Gen Z consumers are intertwining the brand with the consumer's identity is through – you guessed it – licensed collaborations.

FLEUR*. For even more fan involvement, Okonma spotlighted Louis Vuitton through the creative lens of the American rapper and long-time friend and collaborator, Pharrell Williams.

[KITH](#), another high-end brand leaning luxury, has also relied on product collaborations for additional engagement. Some recent collaborations include the New York Knicks basketball team and numerous Marvel IPs. For the Marvel collection, KITH reimagined archival Marvel illustrations, graphics and logos to create elevated apparel styles, accessories, home goods and collectibles.

“Our continued partnership with KITH presents our latest collaboration, one bringing Marvel’s 85th anniversary to life with a fashion-forward collection,” says Paul Gitter, executive vice president, global brand commercialization, Disney. “Marvel and KITH share a similar ethos that places both brands at the center of cultural influence and as driving forces in the lifestyle space. Our global collaborations offer consumers unique and modern product offerings that set us apart in today’s market.”

Disney-owned Marvel has gotten some luxury love, but classic Disney IP has also made its way to the luxury market. No matter the price point, Disney-owned IPs have continued to be popular. For example, Coach New York released a collaboration inspired by Mickey Mouse and Friends recently. From bags to jewelry to keychains and more, Coach leaned into the love of classic Disney IP to market itself more to its consumers. Beyond Disney IP, Stuart Vevers, creative director, Coach New York, says that customization is what is now defining value, and that customization recently inspired Coach’s spring collection.

“So many elements of this collection come down to personality,” says Vevers. “We’ve taken very archetypal pieces and made them unique to the wearer, with the proportions, with the styling and with very playful embellishments that call into question the idea of traditional ‘luxury.’ I think what’s more valuable today is something that’s personal.”

Luxury resale retailer The RealReal’s 2024 Luxury Resale Report notes that personalization and appealing to identity and style creation has allowed certain brands to flourish.

“Fashion is undergoing a seismic shift,” says Rati Sahi Levesque, president, The RealReal. “Trends less frequently flow from the top and are now emerging from the ground up through things like TikTok, television shows and everyday street style.” Levesque also notes that cultural touchpoints are “driving demand for unique, high-value items that reflect [Gen Z’s] personal style.”

Gen Z values uniqueness and therefore craves personalized fare. Luxury items appealing to this generation must be tailored to their expectations on quality, value and interest to keep them captivated.



Coach New York's spring 2025 runway

Fashion Retailers as Gen Z Consumer Drivers

According to the 2024 License Global Leading Licensees Report, retailers have seen an increase in activity from consumers through both brick-and-mortar and e-commerce channels. A variety of these retailers have captured the attention of Gen Z. Gen Z consumer favorites include online retailers like SHEIN and Cider, sustainable picks like Reformation and Madewell, and mall giants like H&M, ASOS, Zara and Forever 21.

A 2023 survey by Statista noted that Forever 21 was the most popular clothing retailer in the U.S., with over half of respondents saying they liked the brand.

"Gen Z uses fashion as a means of self-expression and like to change up their look dramatically, even within the course of one day," says Masako Konishi, chief merchandise officer, Forever 21. "At Forever 21, we aim to inspire our shoppers to have fun with fashion and embrace whoever they want to be – whether that's being preppy by day and edgy by night. With Gen Z, we try to meet them where they are; for example, the cultural zeitgeist of music festivals where we have worked closely with Rolling Loud and Governor's Ball to activate with capsule collections and on-site pop-up experiences. We also drive collaborations with beloved brands and creators and offer the fashion they seek at the price points they love."

In order to continue getting the attention of consumers, Forever 21 has adopted an omnichannel strategy that pulls from the strengths of multiple shopping channels. That way, Gen Z can get whatever they want from wherever they are. Additionally, it makes it easy for its consumer base to shop via social media with the help of influencers.

"Today, many customers start their shopping journey on social media (e.g. TikTok and Instagram)," says Konishi. "At Forever 21 we partner with social influencers to place our product stories in front of the right customers and then make it seamless to shop our app, website or store. This omnichannel strategy includes

Konishi says that a macro trend driving the fashion industry is Gen Z's love for dressing for specific occasions, where they "eventize" different moments in their lives, constantly tailoring their style and experimenting with new trends. By offering them these trends, Gen Z can find their own personal styles and feel free to experiment with lower-priced fare as they feed into Forever 21's ecosystem. Another ecosystem feeder for Forever 21's Gen Z consumers is licensed partnerships. These partnerships often have multiple purposes for the consumer: they connect them to their favorite IPs while allowing them to participate in the latest fashion trends. For example, Forever 21 recently released two collections inspired by Y2K fashion: one for the 20th anniversary of "Mean Girls" and one with Juicy Couture.

"Recently, to celebrate 'Mean Girls' Day and the 20th anniversary of the beloved movie, [Forever 21 launched a limited edition fashion collection](#) that paid homage to the film, alongside a co-branded [Juicy Couture](#) collection, both reviving iconic Y2K fashion looks," says Konishi. "The collections were fan must-haves, with items selling out quickly and high consumer engagement on social media. Offering our shoppers relevant co-branded collections allows us to be part of meaningful cultural moments while delivering fashion at an incredible value."

Other retailers like GAP have collaborated to bring in younger consumers, with collections like [GAP x Cult Gaia](#) leading the charge.

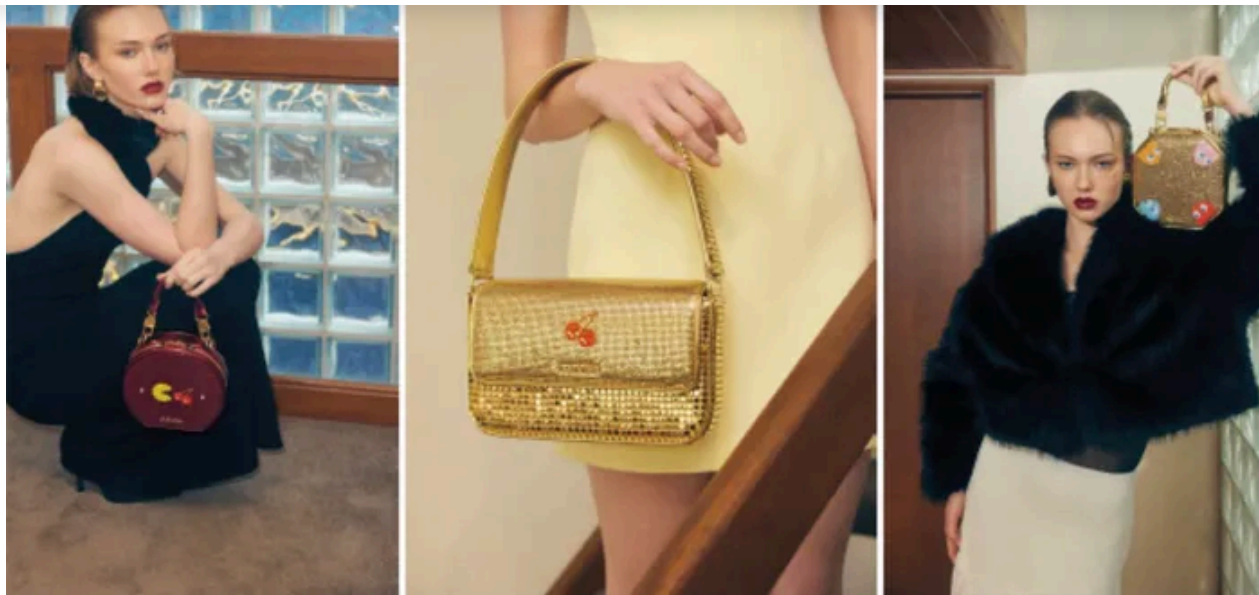
"This collection with Cult Gaia is a beautiful reimagining of Gap icons with a partner who shares our obsession to product detail," says Mark Breitbard, president, chief executive officer, GAP. "Every piece was created with intention with a focus on fabrications, hardware and stitching. We are delivering elevated designs and fresh fits that our customers can cherish forever."

Cult Gaia, a Los Angeles-based lifestyle brand known for high-end clothing, accessories, shoes and swimwear, leans on modern, sculptural designs, which has garnered it some loyal fans. With the help of GAP, Cult Gaia landed in the hands of more consumers.

"Reimagining GAP's classic icons through Cult Gaia's lens has been an amazing journey," says Jasmin Larian Hekmat, founder, designer, Cult Gaia. "The collaboration brought together GAP's classics and everyday wearability with Cult Gaia's sculptural and artistic approach, merging our two distinct creative forces. Each piece in this collection is thoughtfully designed to inspire creativity, blending art and function in a unique and timeless way."

What Gen Z will choose to spend their money on varies, but Statista notes that the average annual expenditure on apparel and services by Gen Z in the U.S. in 2022 was about \$1,200. Comfort was voted the most important criterion when choosing apparel in 2023, at 57%, followed closely by quality. Gen Z were most likely to purchase apparel from big-box stores, but this was at a lower share than older generations. Even though the survey found that Gen Z's fourth most shopped store type was specialist fashion stores, they were likelier to buy from a specialist fashion store than previous generations.

Gen Z's love for omnichannel options, social media connection, customization and fandom will continue to shift the retail market as they garner more spending power.



Items from the Glomesh x PAC-MAN collection

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