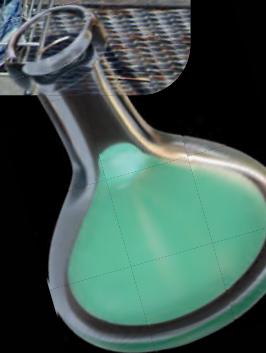


PION. 100



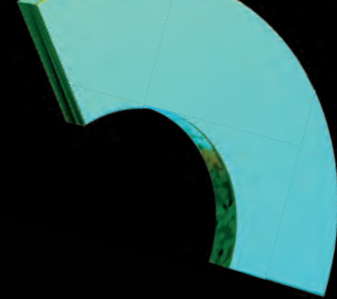
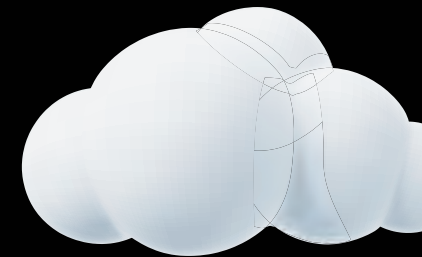
The Most Influential
Youth Brand Ranking
of 2026



PION!

Contents

	FOREWORD
04	The Pion100 report
	CHAPTER 1
08	Brands that impacted 2025
	CHAPTER 2
15	Brand attitudes, engagement & deal-seeking
	CHAPTER 3
18	Spending personas
	CHAPTER 4
31	The Pion100 list
	CHAPTER 5
42	Sector deep dives
	CHAPTER 6
70	Strategic commentary & summary





The PION.100 report



Most marketing platforms make you rent an audience and pay for clicks, but own nothing. We think brands deserve more. That's why Pion helps you run and promote offer programs where you can verify customers, own your data and reach new high-value audiences, without compromise. And, we provide actionable market insights and targeted ad solutions to help you confidently accelerate your growth.

The most valuable audience right now? Gen Zalpha. A generation sitting between Gen Z and Gen Alpha, and the most influential and dynamic demographic yet. Winning Gen Zalpha requires a shift in our understanding of brand competition and loyalty – and this Pion100 report culminates our most in-depth research so far into what drives young people's shopping behaviour.





What is the Pion100?

The Pion100 report ranks UK brand perception among Gen Zalpha based on a study of over 2000 16-24 year olds. Over several months, we gathered insights on 700 brands across 13 sectors, combining quantitative sentiment data with qualitative feedback from focus groups.

Research focused on brands where young people actually spend money, and analyzed them across sectors, not just within them. Netflix doesn't just compete with Apple TV for screen time;

it competes with Nike for emotional loyalty, too. This cross-sector view reveals the true dynamics of youth brand relationships.

Our method measured attitudes towards brands using a 'Love' scale, where young shoppers ranked brands under: Love, Like, Indifferent, Dislike, Hate, or Don't know. We combined the 'Love' and 'Like' scores to demonstrate overall positive association to brands, formed from their product, customer service, advertising and social media outputs.

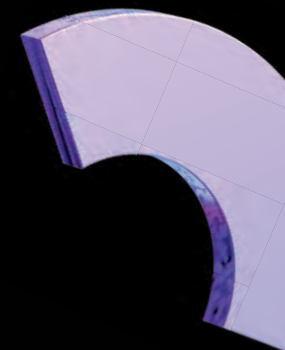


What we found...

The brands thriving amongst young consumers aren't confined by traditional categories, instead, they create their own space within the grey. Success isn't only about chasing trends or exclusivity – It's about knowing your role and owning it, unapologetically. For 16-24 year olds, discount apps, deals and loyalty cards aren't for occasional bargain-hunting, they're the norm, and how this generation shops every day. We hope this report acts as a valuable resource in understanding how Gen Zalpha perceive and shop brands, and provides insight and inspiration on capturing their hearts and minds.



Richard Jackson
HEAD OF CONTENT
AT PION





CHAPTER 1:

Brands that impacted 2025

There are two core principles the brands thriving with young consumers abide by. Instead of being confined by traditional categories, or only chasing trends and exclusivity, they create their space within the grey, and own it, unapologetically. And, they understand that for 16-24 year olds, discount apps, deals and loyalty cards aren't for occasional bargain-hunting, it's simply how this generation shops every day.

We hope this report acts as a resource in understanding how Gen Zalpha perceive and shop brands, and provides valuable insight and inspiration on capturing their hearts and minds.



Brands that won in 2025...

These brands carried weight culturally in 2025 (not to be confused with the Pion100 ranking which is built from our brand love scale).

The undisputed champion:

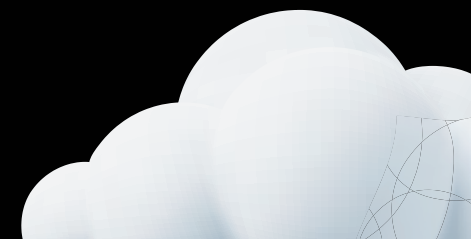


The affordable fashion heroes:

SHEIN PRIMARK® **ZARA** **H&M**

The big tech leaders:

amazon  **SAMSUNG** **NETFLIX**



BRAND SPOTLIGHT:

Nike Cortez

Nike's summer wasn't just about dominance — it was about consistency. With over 300 mentions (totalling 16% of all responses), Nike remained the undisputed champion of youth culture.

“

Nike's been everywhere this summer with new sneaker drops, collabs, and high-visibility at all major events.

Pion Gen Zalpha panelist

”



IMAGE SOURCE: TIKTOK @ELLENBROCKYGIRL



Already a favourite amongst 16-24 year olds for its retro appeal and versatility, the Nike Cortez hit peak cultural relevance in 2025. It was everywhere: on feet, on feeds, and in conversations. While other brands chased trends, Nike delivered as always: quality, cultural relevance, and accessibility.

“

Nike has been spectacular this year.

Pion Gen Zalpha panelist

”



IMAGE SOURCE: SPOTERN

The insight:

Nike doesn't reinvent itself to stay relevant. Instead, it keeps showing up, keeps collaborating within the zeitgeist, and keeps making products that truly work for 16-24 year olds. In a culture that chases newness, consistency is a powerful form of innovation.

The takeaway:

During economic uncertainty, reliability and consistency win over flashy repositioning. Nike proved that playing to your strengths whilst maintaining cultural visibility is the path to sustained loyalty amongst 16-24 year olds.

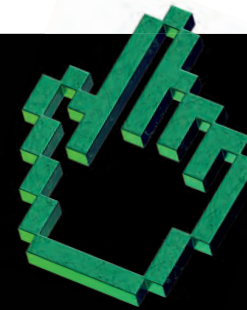


IMAGE SOURCE: GO

THE AFFORDABILITY HERO: Shein



Whilst Nike dominated through consistency, Shein represented something different: a way to stay on trend without the price tag.

Shein's viral summer wardrobe consisted of matching co-ords and colourful beachwear, promoted by influencers (often on TikTok) who were encouraged to create 'Picks for You' edits featuring their top Shein finds. Promotion codes layered on top of already affordable prices made these haul videos essential viewing (and shopping) for young people wanting to keep their wardrobe fresh for less.

“

I've seen SO many people, friends and influencers choose [Shein] this summer.

Pion Gen Zalpha panelist

”



IMAGE SOURCE: GLOSSY.CO



IMAGE SOURCE: THE ECONOMIST



The insight:

This is the Say/Do Gap in action. Young consumers want on-trend fashion (Say), but budget constraints determine where they actually shop (Do). Shein provides a solution that fills that gap.

The takeaway:

Shein's appeal was about solving a real problem young people are facing: they want to look and feel 'cool', but need to stick to a budget.



IMAGE SOURCE:
THE NEW YORK TIMES

Three rules for 2026

Based on the brands who became viral in summer 2025, here's what brands need to know to succeed in 2026:

- 01 **Consistency keeps brands alive** – Nike's consistent strength builds cultural relevance without the need for constant reinvention.
- 02 **Affordable fashion closed the style gap** – Shein proved 16-24 year olds would rather participate in trends affordably, than admire them from afar.
- 03 **Summer demands visibility** – In summer, brands that help young people look relevant and 'cool' within their social circle matter most.



CHAPTER 2:

Brand attitudes, engagement & deal-seeking

Young consumers are highly engaged with brands, savvy about deals, and surprisingly selective about where they spend their money.

Our data underpins the fact that young people are pro brands. 87% have positive feelings toward brands, with 36% saying they "love" brands and 51% saying they "like" them. Only 13% claim indifference. To aid in buying these brands, young people actively use multiple discount strategies.

87%



HAVE POSITIVE FEELINGS TOWARDS BRANDS.

36%



SAY THEY LOVE BRANDS.

51%



SAY THEY LIKE BRANDS.

13%



CLAIM INDIFFERENCE.



Gen Z alpha love brands

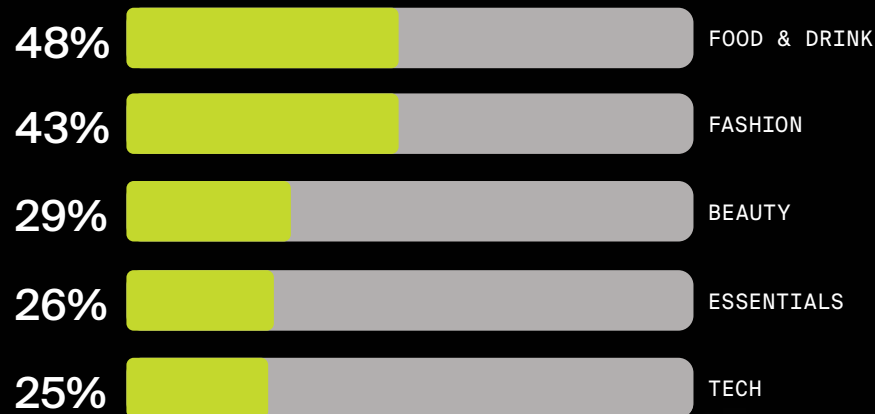
Despite their brand enthusiasm, 72% of 16-24 year olds describe themselves as “careful budgeters” who spend strategically. This isn’t about being cheap; it’s about wanting the brands they love at the right price.

Savvy deal-seeking behaviour

Far from being passive consumers, young people actively use multiple discount strategies. Student discount apps are used by over three quarters of all students (86%) proving that offers are critical to how this financially-constrained generation access and stay loyal to brands.

Category is key

In November 2025, young people actively sought deals in the following sectors:



The takeaways

- 01 **Brand loyalty is thriving:** 87% of young people have positive feelings towards brands. Student discounts drive loyalty: 47% of students use discount cards or apps regularly. Discounts should be viewed as relationship-building investments, not just margin erosion.
- 02 **Focus where it matters:** Food, fashion and beauty brands drive both spending and deal-seeking.



Young consumers aren’t rejecting brands – they’re rejecting full-price shopping. The brands that understand this distinction and meet them halfway with student programmes and loyalty schemes, are building relationships that will outlast this generation’s budget constraints.

Will Weeks, CMO, Pion



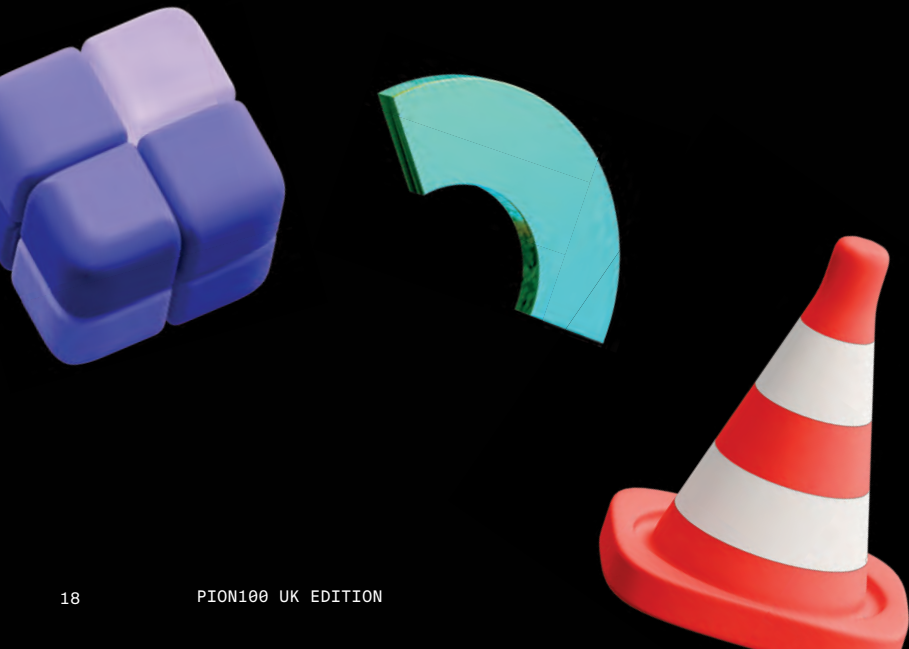
CHAPTER 3:

Spending personas

Not all 16-24 year olds spend the same way. Traditional demographics like age and gender tell part of the story, but they miss the nuance of how young people make shopping decisions. That's why we developed a spending persona model that captures the real-world dynamics of youth consumer behaviour.

Our research identified four distinct personas based on two critical factors: where their money comes from, and how they choose to spend it. These personas were built using Pion spending data, and they reveal differences in relationships with brands, spending priorities, and opportunities for marketers.

Overall, 75% of young consumers are budget-conscious, regardless of their funding source (independent cautious at 38% + supported but cautious at 37%), whilst only 25% see themselves as free-spending.



Spending profiles

Supported but cautious spenders

AVERAGE MONTHLY SPEND £393

- Living costs & expenses covered by parents
- Cautious with spending
- Lives a less active social life
- Budgets in a relaxed way due to low outgoings



Parent-supported splurgers

AVERAGE MONTHLY SPEND £1249

- Living costs & expenses covered by parents
- Splurges on luxuries
- Lives a busy social life
- Doesn't tend to budget



Independent, cautious spenders

AVERAGE MONTHLY SPEND £535

- Living away from home & pays for rent
- Self-funds living costs with loans & part-time work
- Lives a fairly quiet social life
- Budgets carefully to avoid overspending



Work hard, play hard spenders

AVERAGE MONTHLY SPEND £1248

- Living away from home & pays for rent
- Works to earn additional income for spending on essentials & socialising
- Lives a busy social life
- Tries to budget but often overspends



Supported but cautious

37% OF YOUTH, 51% OF STUDENTS

The second largest persona at 37% of youth consumers. Their living expenses are covered by parents or family, yet they approach spending carefully. Remarkably, half of all students fall into this category despite having parental support.



How they live

- **Funding:**
Mostly by parents/family
- **Spending approach:**
Very careful and stick to a strict budget
- **Social habits:**
26% go out to socialise often (vs 40% average), 74% prefer staying in (vs 60% average)
- **Brand attitude:**
37% love brands (vs 36% average), 45% like brands (vs 51% average), 18% don't care (vs 13% average)

Deals and discounts

Despite parental support, they actively seek value, using cashback apps and deal-hunting strategically, to make their money stretch further (even when it's not their own).

The takeaway

The supported but cautious shoppers' top 10 most-loved brands aren't aspirational, they're achievable. Each delivers consistent value without breaking their careful budgets.

What this means

At 97% Greggs is their most loved brand, capturing this group's mindset perfectly—affordable treats that feel like choice, not compromise. But the revelation is Sainsbury's at #3 (with 89%) showing this group doesn't separate "boring necessities" like supermarkets from "exciting brands." Instead, they're building adult identities on parental budgets.

Their top ten most-loved brands

01	Greggs	97%
02	Nike	91%
03	Sainsbury's	89%
04	YouTube	86%
05	PayPal	85%
06	KFC	84%
07	H&M	84%
08	Samsung	83%
09	Netflix	83%
10	Argos	83%

Parent-supported splurgers

12% OF YOUTH, 14% OF STUDENTS

At just 12% of youth consumers, this is the smallest persona. Although their living expenses are covered by family, they're still comfortable spending freely. Despite its size, this group represents 14% of students, proving parental support doesn't automatically mean cautious spending.



How they live

- **Funding:**
Mostly by parents/family
- **Spending approach:**
Spend fairly freely on things they want
- **Social habits:**
29% go out to socialise often (vs 40% average)
71% prefer staying in (vs 60% average)
- **Brand attitude:**
32% love brands (vs 36% average)
45% like brands (vs 51% average)
23% don't care (highest vs 13% average)

Deals and discounts

Although they have the lowest deal-seeking behaviour (only 20%), nearly half of this persona use cashback apps. They're not hunting for discounts, but won't pass up free money. It's opportunistic rather than strategic.

The takeaway

Parent-supported splurgers ranked Lidl at #7 (92%) alongside premium entertainment brands, revealing their philosophy: spend freely on what matters, spend smartly on what doesn't. They'll favour discount supermarkets to save money for brands they're genuinely passionate about like Sony, Netflix and Spotify.

What this means

This persona is defined by contradiction. They have money to spend freely, yet they're homebodies. They have the highest "don't care about brands" score at 23% (nearly double the average), yet for brands they DO care about, they achieve the highest brand "love" scores in our study (Sony and Subway both scored 100% brand love). And, they're loyal to brands, rather than shopping around.

Their top ten most-loved brands

01	Sony	100%
02	Subway	100%
03	Netflix	94%
04	KFC	93%
05	H&M	93%
06	Disney+	92%
07	Lidl	92%
08	McDonald's	92%
09	Spotify	86%
10	Amazon.co.uk	85%

Independent cautious

38% OF YOUTH, 27% OF STUDENTS

The largest persona at 38%, these young consumers fund their own lifestyles through work, loans, or savings, and spend carefully as a result. They're building financial independence, one strategic purchase at a time.



How they live

- **Funding:**
Mostly self-funded (work/loans/savings)
- **Spending approach:**
Very careful and stick to a strict budget
- **Social habits:**
35% go out to socialise often (vs 40% average), 65% prefer staying in (vs 60% average)
- **Brand attitude:**
40% love brands (highest vs 36% average)
45% like brands (vs 51% average)
16% don't care (vs 13% average)

Deals and discounts

They are THE deal-hunting persona. They lead in cashback app usage and look strategically for deals on every purchase.

The takeaway

Every brand in their top ten delivers maximum value per pound: free (YouTube), bundled (Prime Video), discounted (Sports Direct), and affordable (Greggs, McDonald's). They're not settling for less; they're optimizing for more.

What this means

For independent cautious shoppers, spending your own money means you love brands MORE than those with parental support. At 40% they have the highest "love brands" score of all four personas. This is about building fierce loyalty to brands that respect their financial reality. When every pound counts, brands delivering genuine value earn genuine devotion.

Their top ten most-loved brands

01	Greggs	93%
02	YouTube	90%
03	Boots	89%
04	Prime Video	89%
05	McDonalds	88%
06	Spotify	87%
07	H&M	87%
08	Nike	86%
09	Netflix	85%
10	Sports Direct	84%

Work hard, play hard

14% OF YOUTH, 9% OF STUDENTS

Self-funded and free-spending, these young consumers have earned their money and feel entitled to enjoy it. At 14% of the overall youth market and just 9% of students, they're the smallest persona but highly influential in their spending categories.



How they live

- **Funding:**
Mostly self-funded (work/loans/savings)
- **Spending approach:**
Spend fairly freely on things they want
- **Social habits:**
39% go out to socialise often (vs 40% average), 61% prefer staying in (vs 60% average)
- **Brand attitude:**
36% love brands (vs 36% average)
51% like brands (vs 51% average)
13% don't care (vs 13% average)

Deals and discounts

Despite spending freely, they actively search for deals MORE than the average youth consumer. On fashion, 57% shop deals (vs 54% average), on food & drink 44% shop deals (vs 38% average), and on beauty 26% shop deals (vs 25% average). They're optimizing value because they appreciate money more, having earned it themselves.

The takeaway

Four brands came first, achieving perfect scores: IKEA, Netflix, New Balance, and YouTube. Their offering covers peak adulting moments – furnishing flats (IKEA), trending entertainment (Netflix, YouTube), and investing in quality fashion (New Balance) whilst saving smartly elsewhere (Sports Direct ranked at #9, and Tesco at #10).

What this means

The work hard, play hard persona matches the youth market brand attitude averages exactly, with 36% saying love, 51% saying like, and 13% don't care. But that's what makes them fascinating, they're building lives, not just living them. And, that's why IKEA sits at #1.

Their top ten most-loved brands

01	IKEA UK	100%
02	Netflix	100%
03	New Balance	100%
04	YouTube	100%
05	Spotify	94%
06	Subway	94%
07	Sainsbury's	94%
08	The North Face	93%
09	Sports Direct	92%
10	Tesco	92%

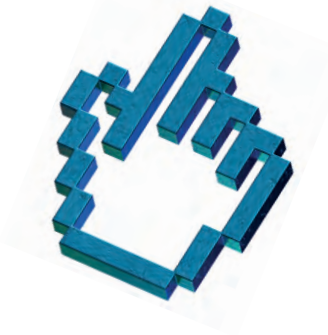




THE 'SAY/DO' GAP:

Why Gen Zalpha can't spend where they want to

Gen Zalpha search for discount codes because their love for brands almost always outweighs their ability to buy those brands. In reality, 16-24 year olds can only spare around 5% of their budget on products and services they really care about. With such a tight budget, they are constantly prioritising and deal hunting to reduce the gap between what they want, and what they can afford.



The three types of 'say/do' gaps



Not all categories face the same problem. There are three distinct groups:

I want this:

FOOD & DRINK

FASHION

BEAUTY

TECH

01 The pattern:

High love score (38-65%)
High deal-seeking (25-48%)
Low spend (~5% each)

02 What brands should do:

Offer a meaningful discount. This isn't about goodwill, it's about converting potential sales. 15-20% student discounts help close the gap between desire and affordability.

I have to:

RENT & BILLS

TRANSPORT

FINANCE & UTILITIES

01 The pattern:

Low love score (14-15%)
Minimal deal-seeking (7-12%)
but this takes up 75% of the budget.

02 What brands should do:

Stop trying to be loved, focus on utility. Make the necessary experience better through convenience and benefits for students.

I need this:

GROCERIES

ENTERTAINMENT & LEISURE

HEALTH & WELLNESS

HOME & LIVING

01 The pattern:

Moderate love (24-36%)
Active deal-seeking (12-26%)
Consistent spending

02 What brands should do:

Win with value and experience. This is the only category where you can capture necessary spending and build loyalty. Use student programmes, content, values, and smart pricing.

Three key takeaways

The gap isn't apathy, it's affordability

When Gen Z alpha look for discount codes they're ready to buy, but are held back by rent taking up most of their budget.



Choose a strategy based on ideal outcome

Discounts convert desire. Utility wins over those who have no choice. Brand experience attracts selective spenders. Choose what works best for your brand.



Student programmes drive revenue

You're not giving away profit; you're closing the 50+ point gap between what they want to buy and what they can currently afford.



CHAPTER 4:

The Pion100 list

The Pion100 report reveals which brands truly resonate with young people and challenges assumptions about what this generation values. From beloved bakeries to streaming giants, our findings tell a story of genuine emotional connection over aspiration – where accessibility and cultural relevance trump luxury every time.

“

The Pion100 isn't just a popularity contest – it's a snapshot of what young people value when money feels tight and choices feel consequential. UK 16-24 year olds are proved to be remarkably pragmatic, rewarding brands that deliver affordability, cultural relevance, and real value over those selling aspirational lifestyles they can't afford.

Richard Jackson, Head of Content at Pion

”



Top 10 most-loved

(LOVE/LIKE SCORE)



10

**SPORTS
DIRECT**

84%

FASHION

The champion of highstreet sportswear. Sports Direct makes sports brands affordable for everyone, turning aspirational labels into everyday reality. For young people stretching their budgets, it's where they can actually afford the Nike trainers they want.

09

SUBWAY

85%

FOOD & DRINK

Customisation is king. Subway lets young people build exactly what they want, how they want it – no compromises. In a world of set menus and limited choices, that level of control hits different. Plus, hyperlocal student discounts make it a reliable lunch spot that doesn't break the bank.

08

Sainsbury's

86%

EVERYDAY
ESSENTIALS

The supermarket with cultural clout. Sainsbury's Nectar card is basically currency for 16-24 year olds, and their mix of own-brand affordability with premium options means everyone can shop there. Price-matching to Aldi also gives young people the reassurance they are not spending more on the essentials they need.

07

McDonald's

88%

FOOD & DRINK

McDonald's always wins – whether it's a post-night-out ritual or a broke lifeline, it delivers zero-judgment consistency. McDonald's lent its place in youth culture with a summer campaign co-authored by young people across the UK, featuring regional slang for its restaurants (Maccers, McDs, Maccys, McDizzles).

06



88%

FASHION

More than sportswear – it's a cultural language. Nike transcends its products to become a symbol of achievement, self-expression, and belonging. Young consumers aren't just buying trainers; they're buying into a movement that speaks to who they want to be.

05



Spotify

88%

ENTERTAINMENT

The soundtrack to young people's lives. Spotify isn't just music streaming – it's identity curation. Playlists become personality, Wrapped becomes annual validation, and student discount makes premium accessible. It's the app that knows you better than you know yourself.

04

H&M

89%

FASHION

Affordable fashion that keeps up with culture. H&M delivers trend-led pieces at prices that make sense for young people cycling through styles. Embracing the IRL trend, H&M staged an elaborate runway show and event on day one of London Fashion Week, signifying there's more to come from the retailer.

03 NETFLIX 90% ENTERTAINMENT

The cultural conversation starter. Netflix creates shared moments that bond young people – whether it's binging the latest must-watch series or sharing hot takes in the group chat. This year, Adolescence hit the headlines, while the new season of Squid Games broke records worldwide.

02 YouTube 90% ENTERTAINMENT

The platform that raised a generation. YouTube is a teacher, entertainer, and community hub all at once. From simple tutorials to deep-dive essays, pure chaos, it's where young people live their digital lives. According to Ofcom, YouTube has overtaken ITV as the second most viewed channel by all age groups in the UK.

01 GREGGS 92% FOOD & DRINK

The people's champion. Greggs winning the top spot isn't a surprise – it's a statement. This is a brand that offers quality, affordability, and genuine cultural relevance. From sausage rolls to vegan options, Greggs meets young people where they are, never pretending to be something it's not. It's authentic, accessible, and absolutely iconic. Peak UK culture.

Why Greggs wins:

- 01 **Unmatched value** – quality food at prices that make sense for every budget, with locations everywhere young people actually are.
- 02 **Cultural icon status** – from viral vegan sausage roll launches to being genuinely meme-worthy, Greggs owns its place in British pop culture.
- 03 **No pretense** – Greggs never tries to be anything other than what it is: reliable, affordable, and beloved. That authenticity resonates deeply with 16-24 year olds.
- 04 **Student discount programme** – Greggs shows genuine understanding of the cost of living crisis and its impact on young people.

“

Greggs' success shows that the most loved brands don't just sell products, they provide cultural symbols that help young people express identity. When a bakery chain becomes this culturally significant, it's because they've stayed true to who they are while genuinely understanding their customers.

Ash Waters, Head of Advertising at Pion

”

SECTOR INSIGHTS:

The surprising patterns



- 01 Entertainment rules everything**
Streaming and gaming dominate, with YouTube achieving the highest “love only” percentage (90%) in our study. This reflects young people’s digital-first lifestyle and willingness to pay for content delivering consistent value. Entertainment & Leisure places 16 brands in our top 100 despite being middle-tier for love to spend.
- 02 Fashion’s democratic appeal**
H&M, Nike, and Sports Direct lead a sector dominated by accessible rather than luxury brands. Sports Direct at #10 outperforms most designer labels, suggesting young people value style accessibility over exclusivity. With 68% loving to spend on fashion, it’s the category young people most want to invest in.
- 03 The necessity brands win**
With five supermarkets landing in the top 27: Sainsbury’s (#8), Tesco (#14), Lidl (#19), Aldi (#23), and Asda (#27), young people clearly don’t find shopping for everyday essentials boring.
- 04 The finance revolution**
Perhaps most surprising, Finance and Utility brands rank high. Despite ranking last for “love to spend”, PayPal (#11) and Evri (#71) achieve remarkable “love only” scores. When brands solve real problems in young people’s lives, emotional connection follows – even in ‘boring’ categories.

What does this mean for brands?

Consistency beats aspiration

Top performers share a common trait: they consistently deliver on their core promise without trying to be something they’re not. Greggs at #1 doesn’t try to be cool – it’s reliable, accessible, and genuinely itself. Young consumers reward authenticity over aspiration every time.

Digital-first is essential

Every top 10 brand has mastered digital engagement. Whether YouTube’s endless content ecosystem or Spotify’s personalised playlists, these brands meet young people in digital spaces naturally. It’s not about being on digital – it’s about being native to it.

Function creates love

Young consumers form emotional connections with brands that make their lives genuinely better. PayPal isn’t loved despite being a finance app – it’s loved because it’s a finance app that works beautifully. Solve real problems, earn real loyalty.

The takeaways

- 01 Do the basics first:** Brand love starts with delivering on your primary promise.
- 02 If it feels like marketing you’ve already failed:** Young consumers can spot forced digital engagement immediately.
- 03 Affordability trumps exclusivity:** Achievable brands build broader emotional connections.

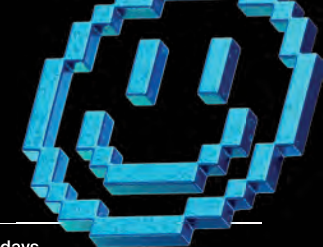


The PION.100

01	Greggs	90%	Food & Drink
02	YouTube	87%	Entertainment & Leisure
03	Netflix	87%	Entertainment & Leisure
04	H&M	86%	Fashion
05	Spotify	86%	Entertainment & Leisure
06	Nike	85%	Fashion
07	McDonald's	85%	Food & Drink
08	Sainsbury's	84%	Everyday Essentials
09	Subway	83%	Food & Drink
10	Sports Direct	82%	Fashion
11	PayPal	81%	Finance & Utilities
12	KFC	81%	Food & Drink
13	Amazon.co.uk	80%	Department Stores & Marketplaces
14	Tesco	80%	Everyday Essentials
15	Disney+	79%	Entertainment & Leisure
16	Nando's	79%	Food & Drink
17	eBay	79%	Department Stores & Marketplaces
18	Argos	78%	Department Stores & Marketplaces
19	Lidl	78%	Everyday Essentials
20	Prime Video	78%	Entertainment & Leisure
21	adidas EU	75%	Fashion
22	Burger King UK	75%	Food & Drink
23	Aldi	75%	Everyday Essentials
24	TK Maxx	75%	Department Stores & Marketplaces
25	Apple TV	74%	Entertainment & Leisure

26	Asda	74%	Everyday Essentials
27	Iceland	74%	Everyday Essentials
28	Samsung Electronics (UK) Limited	74%	Consumer Electronics & Tech
29	LEGO	73%	Books, Gifts & Hobbies
30	Costco	73%	Department Stores & Marketplaces
31	Boots	72%	Health, Fitness & Wellbeing
32	Domino's Pizza UK and Ireland Limited	72%	Food & Drink
33	IKEA UK	72%	Home & Living
34	Nintendo	72%	Consumer Electronics & Tech
35	B&M	72%	Department Stores & Marketplaces
36	Costa Coffee	71%	Food & Drink
37	Starbucks	71%	Food & Drink
38	Pets At Home	71%	Home & Living
39	Krispy Kreme UK	71%	Food & Drink
40	Microsoft UK	70%	Consumer Electronics & Tech
41	The North Face	70%	Fashion
42	The Range	69%	Department Stores & Marketplaces
43	Ralph Lauren	66%	Fashion
44	Five Guys	66%	Food & Drink
45	Sony	65%	Consumer Electronics & Tech
46	New Balance	65%	Fashion
47	Airbnb	65%	Travel & Holidays
48	Xbox	65%	Consumer Electronics & Tech
49	Marks & Spencer	65%	Department Stores & Marketplaces
50	PlayStation	64%	Consumer Electronics & Tech





51	Amazon Prime Student UK	64%	Entertainment & Leisure
52	B&Q	64%	Home & Living
53	Calvin Klein	64%	Fashion
54	Deliveroo	63%	Food & Drink
55	Steam	63%	Consumer Electronics & Tech
56	Taco Bell	63%	Food & Drink
57	Superdrug	62%	Health, Fitness & Wellbeing
58	The Perfume Shop	62%	Beauty
59	Disneyland	62%	Entertainment & Leisure
60	Hugo Boss	61%	Fashion
61	PizzaExpress	61%	Food & Drink
62	Zara	61%	Fashion
63	Gymshark	61%	Fashion
64	John Lewis	61%	Department Stores & Marketplaces
65	The Fragrance Shop	60%	Beauty
66	Dior	60%	Fashion
67	Sky	60%	Entertainment & Leisure
68	Waitrose	60%	Food & Drink
69	EasyJet Holidays	60%	Travel & Holidays
70	Dyson	60%	Home & Living
71	Etsy	60%	Department Stores & Marketplaces
72	Sky	60%	Entertainment & Leisure
73	Build-A-Bear	60%	Books, Gifts & Hobbies
74	Evri	60%	Finance & Utilities
75	Duolingo	59%	Books, Gifts & Hobbies

76	ASOS UK	59%	Fashion
77	Booking.com	59%	Travel & Holidays
78	Jet2	59%	Travel & Holidays
79	Currys PC World	58%	Consumer Electronics & Tech
80	Pandora Jewellery UK Limited	58%	Fashion
81	My Nintendo Store	58%	Consumer Electronics & Tech
82	Dunelm	58%	Home & Living
83	Temu UK	57%	Department Stores & Marketplaces
84	J D Wetherspoons	57%	Food & Drink
85	Lush	57%	Beauty
86	Cineworld	57%	Entertainment & Leisure
87	The Body Shop	57%	Beauty
88	Alton Towers	56%	Entertainment & Leisure
89	Oasis	56%	Food & Drink
90	GoPro	56%	Consumer Electronics & Tech
91	Audible	56%	Books, Gifts & Hobbies
92	CeX	55%	Consumer Electronics & Tech
93	GAME.co.uk	55%	Books, Gifts & Hobbies
94	Amazon Kindle	55%	Entertainment & Leisure
95	Victoria's Secret	55%	Fashion
96	Google Store	54%	Consumer Electronics & Tech
97	George At Asda	54%	Fashion
98	Virgin Media	54%	Finance & Utilities
99	PureGym	54%	Health, Fitness & Wellbeing
100	New Look	53%	Fashion



CHAPTER 5:

Sector deep dives

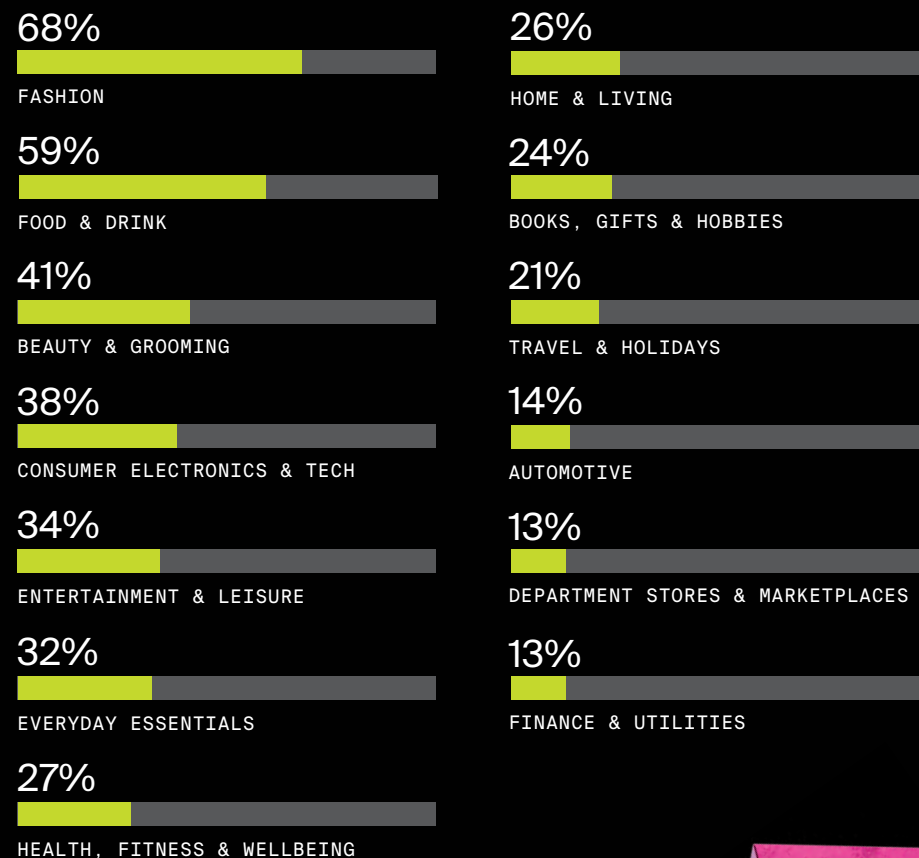
Young consumers don't engage with all sectors equally. Our research shows differences in both spending enthusiasm and brand loyalty across the 13 key sectors that define the youth economy.

The love to spend hierarchy

The gap between sectors tells a story of priorities, accessibility, and genuine value delivery. While 68% of young people enjoy spending on Fashion, only 13% feel the same about Finance & Utilities – yet as Chapter 4 revealed, finance brands are some of the top performing brands. Let's look at the full love to spend rankings.



The love to spend rankings:









Fashion



LOVE TO SPEND
SCORE: 68%

Rank #1 of 13 sectors

Fashion combines self-expression and accessibility. Young consumers reward brands making style available to everyone while staying culturally relevant.

01		89%	Affordable fashion accessibility
02		88%	Cultural icon
03		84%	Makes premium affordable
04		77%	
05		72%	
06		68%	
07	RALPH LAUREN	67%	
08	Calvin Klein	65%	
09	HUGO BOSS	63%	
10	ZARA	62%	

Brand spotlight: Sports Direct's accessibility revolution

Sports Direct occupies unique UK space: where aspiration meets affordability. The retailer takes brands young people covet – Nike, adidas, The North Face – and makes them genuinely accessible through aggressive pricing. For 16-24 year olds stretching limited budgets, Sports Direct solves a real problem: how to wear the brands that matter without breaking the bank.

The brand doesn't try to be cool or curated; it's honest about being a discount destination. That authenticity resonates. Young consumers appreciate retailers that don't pretend to be something they're not.

The strategy takeaways

- 01 Affordability drives loyalty – Young consumers like brands that remove barriers to accessing them.
- 02 Authenticity over aspiration – Showing value honestly is relatable, while overselling aspiration can fall flat.
- 03 Cultural relevance requires presence – Brands must stay embedded in youth culture through sport, music, and movements.



The Top 10 shows that performance and presence dominate youth fashion in the UK. Streetwear dominates the top 5 reinforcing it's position as core culture, but H&M's attainable fashion – bolstered by designer collaborations – proves accessibility is the ultimate conversion tool for an audience looking to make their budget go further.

Will Weeks, CMO, Pion







Food & Drink



LOVE TO SPEND
SCORE : 59%

Rank #2 of 13 sectors

Young consumers prioritise affordable indulgence, from fast-food and casual restaurants to coffee chains, brands combining reliability with experience win.

01	 GREGGS	92%	The UK's excellence standard
02	McDonald's	88%	Reliability comfort blanket
03	SUBWAY	85%	Customisation accessibility
04	KFC	83%	
05	Nando's.	83%	
06		77%	
07	 Domino's	76%	
08	COSTA COFFEE	72%	
09	STARBUCKS	72%	
10		72%	

Brand spotlight: Greggs on top form

Greggs ranking top in both the overall Pion100 list and the Food & Drink list isn't just about great sausage rolls – it's about a brand genuinely understanding its audience. The bakery chain mastered being exactly what it is: reliable, affordable, and proudly British. When they launched vegan sausage rolls, it wasn't performative sustainability – it was a practical response to customer demand that created viral cultural moments.

For 16-24 year olds navigating tight budgets, Greggs solves multiple problems: quick fuel between lectures, affordable lunch without compromise, student discounts that actually matter. Embedded enough in British culture that eating there carries no social stigma – quite the opposite. Greggs proves you don't need to reinvent yourself to stay relevant; deliver consistently on promises that made you beloved.

The strategy takeaways

- 01 Fast-food dominates premium – No fuss food beats sit-down dining.
- 02 Loyalty programmes build relationships – Student discounts are strategic tools, not costs.
- 03 Stay authentic – Staying true to your core wins over chasing trends.



Greggs embraces self-deprecating, quintessential British humor. This approach, exemplified by collaborations like branded Primark hoodies and “bistro” events, reframes the budget bakery as an ironic lifestyle brand. This genuine, unpolished authenticity strongly appeals to a generation wary of traditional corporate marketing...By combining low prices with high cultural relevance, Greggs has transcended food to become a genuine badge of British youth culture.

Aurelie Genet, Head of Growth Marketing, Pion



Beauty & Grooming

LOVE TO SPEND
SCORE: 41%

Rank #3 of 13 sectors

Beauty fuels passionate engagement. Young consumers (especially women: 65% stating they “love to spend” on beauty) invest in brands offering them accessible experimentation.

01	THE PERFUME SHOP	63%	Scent destination authority
02	The Fragrance Shop	62%	Fragrance made simple
03	LUSH	58%	Handmade beauty rebellion
04	THE BODY SHOP	58%	
05	MAYBELLINE NEW YORK	57%	
06	FENTY BEAUTY	55%	
07	The Ordinary.	51%	
08	NYX	51%	
09	Rare Beauty	50%	
10	Charlotte Tilbury	47%	

Brand spotlight: Lush’s experiential authenticity

Lush occupies a unique UK beauty space: retail as theatre. Walk past a Lush store and you can’t ignore it – the scent draws you in, insta-worthy bath bombs captivate, and staff create engaging demonstrations. What makes Lush resonate with 16–24 year olds is refusal to compromise on values. Commitment to handmade products, ethical sourcing, environmental activism isn’t marketing fluff – it’s fundamental to their identity.

Lush has also mastered gift culture. Young people buy products for friends, family, and themselves when they want something special but affordable. A bath bomb isn’t just skincare – it’s a self-care ritual, bathroom escapism, and a piece of shareable content all in one brightly-coloured package.

The strategy takeaways

- 01 Passion-driven targeting – Lush focuses on enthusiasts rather than chasing mass appeal.
- 02 Cheaper ranges allow experimentation – Affordable prices let young people explore.
- 03 Values and transparency matter – Radical honesty around ingredients and ethics wins.

“

Gen Z’s beauty consumption is social-first and hyper-informed – they research ingredients, interrogate brand ethics, and rely heavily on creator credibility before making a purchase. Platforms like TikTok give new trends fame, so brands with strategies centred around agility and authenticity are coming out top when capturing the attention of young people today.

Sheeva Fallahi, Content Strategist, Pion





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Consumer Electronics & Tech

LOVE TO SPEND
SCORE : 38%

Rank #4 of 13 sectors

The essential tools sector where functionality meets lifestyle. Young consumers prioritise brands seamlessly integrating into their daily lives, over flashy innovation.

01	SAMSUNG	75%	Android ecosystem leader
02	 Microsoft	72%	Productivity powerhouse
03	SONY	67%	Entertainment tech heritage
04	 XBOX	68%	
05	PlayStation	67%	
06	duolingo	63%	
07	currys	58%	
08	 GoPro	58%	
09	 eX	57%	
10	Google Store	56%	

Brand spotlight: Samsung's ecosystem accessibility

Samsung occupies a unique UK tech position: premium innovation at multiple price points. While Apple commands aspirational desire, Samsung delivers comparable features across ranges that meet young people's budgets. Galaxy A-series puts flagship capabilities within reach, making Samsung the pragmatic choice. What drives performance is integration without lock-in anxiety – phones, earbuds, tablets, watches become accessible gradually, rather than requiring upfront commitment.

Samsung also demonstrates its understanding of student life by providing substantial education discounts and devices built for multi-tasking reality – split-screen capabilities, DeX desktop mode, cross-device continuity.

The strategy takeaways

- 01 Experiences over individual products – Interconnected experiences beat isolated gadgets.
- 02 Gaming dominates engagement – Community-building links to lasting loyalty.
- 03 Functionality trumps flashiness – Problem-solving wins over status symbols.

“

Samsung succeeds in combining connection with utility. They're leveraging creators and real-life experiences to build cultural relevance, while simultaneously using their diverse product ecosystem to support every Gen Z use case. When you combine that cultural clout with a smart pricing strategy, inclusive of exclusive student deals, you get a tech brand that doesn't just sell devices – it becomes an indispensable part of young people's lives.

Will Weeks, CMO, Pion











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Entertainment & Leisure

LOVE TO SPEND
SCORE: 34%

Rank #5 of 13 sectors

Streaming-dominated sector delivering cultural connection and value. Young consumers prioritise platforms delivering consistent content worth paying for.

01	 YouTube	90%	Platform that raised a generation
02	 NETFLIX	90%	Cultural conversation creator
03	 Spotify	88%	Soundtrack curator of identity
04	 Disney+	85%	
05	 prime video	83%	
06	 apple tv	79%	
07	 amazon prime	67%	
08	 DISNEYLAND	64%	
09	 sky	62%	
10	 My Nintendo Store	59%	

Brand spotlight: YouTube's universal appeal

YouTube isn't just a platform – it's the internet's universal operating system for 16-24 year olds. From simple how-to tutorials replacing Google searches, to essay videos that educate, comedy sketches that entertain, and providing a space for niche communities to connect, YouTube serves every possible need. What makes YouTube untouchable is its dual nature: it's completely free yet infinitely valuable. While Netflix and Spotify require subscriptions, YouTube delivers comparable value at no cost.

YouTube also wins on authenticity. Creators like Mr Beast capture the attention of the next generation while offering a platform for artists like BLACKPINK to showcase their music. This platform raised 16-24 year olds – so it's no surprise it's their most liked entertainment source.

The strategy takeaways

- 01 Free access drives mass engagement - Accessibility beats exclusivity in youth attention.
- 02 Community and participation matter - Two-way interaction outperforms passive consumption.
- 03 Values and transparency matter - Radical honesty around ingredients and ethics wins.

“

YouTube's reign as a staple youth culture shows that legacy doesn't mean irrelevance. A consistent, co-owned approach to both brand and platform is key, and it's that's kept them at the forefront of the youth experience for two decades. As the originators of mainstream creator culture and a continual mainstay for social search, the platform remains a key part of their daily lives.

Lianre Robinson, CEO, The Marketing Academy Foundation

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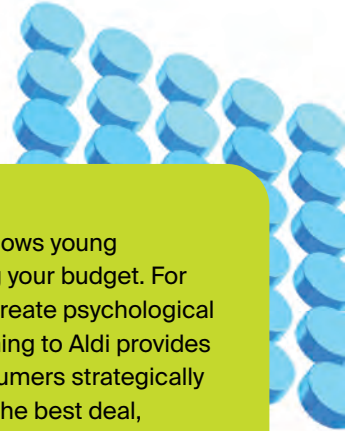
Everyday Essentials

LOVE TO SPEND
SCORE : 32%

Rank #6 of 13 sectors

Necessity drives loyalty. Young people reward retailers who stretch their limited budgets while still delivering on quality and value.

01	Sainsbury's	84%	Price-match loyalty leaders
02	TESCO	80%	Britain's biggest grocer
03	LIDL	78%	Discount quality champion
04	ALDI	75%	
05	Iceland	74%	
06	ASDA	74%	
07	Morrisons	72%	
08	pets at home	71%	
09	WAITROSE	60%	
10	savers	50%	



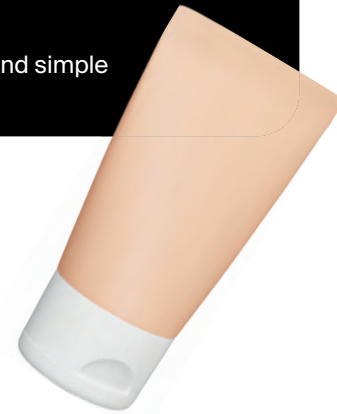
Brand spotlight: Sainsbury's loyalty mastery

Sainsbury's winning the Everyday Essentials category shows young consumers want to feel like a grown-up whilst protecting your budget. For 16-24 year olds managing tight budgets, Nectar points create psychological value beyond immediate transactions, while price matching to Aldi provides reassurance that money isn't being wasted. Young consumers strategically buy products to maximise their points or when they get the best deal, gamifying loyalty programmes so they can win.

Sainsbury's also balances accessibility with aspiration. The 'Taste the Difference' range lets young people occasionally access premium products, while own-brand essentials keep weekly shops affordable. This tiered approach respects that 16-24 year olds spending varies week-to-week based on available funds.

The strategy takeaways

- 01 Loyalty programmes create lasting relationships – Tangible rewards build habits beyond price competition.
- 02 Discount retailers win on value – Young consumers prioritise affordability for necessary spending.
- 03 Convenience breeds loyalty – Easy locations and simple experiences matter most.













Health, Fitness & Wellbeing



LOVE TO SPEND
SCORE : 27%

Rank #7 of 13 sectors

Wellness is an aspirational sector where brands succeed by turning necessary purchases into value-driven habits.

01		76%	Rewards-driven health leader
02		64%	Value health and beauty
03		57%	No-frills fitness access
04		52%	
05		50%	
06		50%	
07		45%	
08		43%	
09		42%	
10		42%	

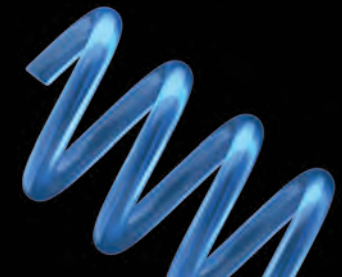
Brand spotlight: Boots' rewards-driven wellness

Boots dominates UK Health & Wellbeing not through revolutionary healthcare, but through brilliant loyalty mechanics. The Advantage Card doesn't just reward purchases – it funds them. Young consumers actively choose Boots because loyalty programmes make their money work harder.

The model proves that in sectors where spending feels necessary rather than aspirational, rewards create emotional connection that pure product quality cannot. Points transform routine pharmacy visits into progress toward goals. Boots also masters high street presence with consistent stock making them the default health destination.

The strategy takeaways

- 01 Rewards drive repeat behaviour – Loyalty schemes transform necessary spending into emotional connections.
- 02 Fitness for everyone – Budget gyms show young people prioritise fitness access over premium facilities.
- 03 The high street factor – Being seen and offering a consistent experience wins in wellness.



Home & Living



LOVE TO SPEND
SCORE : 26%

Rank #8 of 13 sectors

Practical design meets accessible prices. Young people prioritise functional, affordable solutions when building first homes and independent living spaces.

01	IKEA	78%	Affordable design leader
02	the Range Home · Leisure · Garden	70%	Budget homeware accessible
03	B&Q	65%	DIY empowerment destination
04	dyson	61%	
05	Dunelm	61%	
06	NINJA	48%	
07	YANKEE CANDLE	48%	
08	NESPRESSO	44%	
09	SCREWFIX	43%	
10	HOMEBASE	39%	



Brand spotlight: IKEA's first home solution

IKEA UK dominates Home & Living because it solves the exact problem young people face: making their spaces liveable and personal, without draining their limited budgets. IKEA lets young people furnish entire rooms for what premium brands charge for single items.

The Swedish retailer understands young adult life intimately. Small-space solutions recognise the reality: most aren't furnishing mansions. Modular storage, multi-function furniture and compact designs respect how 16-24 year olds actually live.

The strategy takeaways

- 01 Affordability is key – Accessible price points necessary for major purchases like furnishing.
- 02 Functionality solves real problems – Brands addressing practical needs win loyalty.
- 03 Style is non-negotiable – Beautiful design alongside affordability required, not optional.








Books Gifts & Hobbies

LOVE TO SPEND
SCORE: 24%

Rank #9 of 13 sectors

Personalisation meets nostalgia. Young consumers invest in creative hobbies, thoughtful gifting, and self-expression in their free time.

01		74%	Creativity champion
02		61%	Experiential gift creation
03		51%	Family toy destination
04	FreePrints™	48%	
05		47%	
06	hobbycraft	46%	
07	Waterstones	46%	
08		43%	
09	funkypigeon.com	42%	
10	JELLYCAT	38%	

Brand spotlight: LEGO's ageless creativity

LEGO dominates the Books, Gifts & Hobbies category by refusing to age out users. While competitors target children exclusively, LEGO embraces adult fans – complex sets, sophisticated builds, and premium pricing respects grown-up budgets and capabilities. Gen Zalpha values these analogue experiences as a counterbalance to their constant digital stimulation.

LEGO also mastered licensed collaboration. Harry Potter, Star Wars, and Marvel sets let fans buy into their beloved franchises. These are display pieces, collectibles, expressions of identity that young consumers proudly showcase, turning bedrooms into museums.

The strategy takeaways

- 01 Nostalgia drives spending – Childhood favourites retain power when respecting adult sensibilities.
- 02 Creative outlets create loyalty – Hands-on creation delivers satisfaction that the digital world cannot.
- 03 Community amplifies individual hobbies – Facilitating connection between enthusiasts builds loyalty, experience wins in wellness.

“

Jellycat is manufactured desire. Scarcity creates value. Limited drops. Designs that disappear forever. Every purchase feels like a win because you got something before it vanished. The pop-ups are extraordinary. Staff in Selfridges performing the preparation of your toy like it's actual fish and chips. That gets filmed. Filmed content gets shared. Shared content creates more demand. It's a flywheel.

They've also deliberately scaled back distribution, cutting around a hundred independent retailers to focus on premium partnerships. Strategically coherent.

Oliver Yonchev, Founder, co creatd

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Travel & holidays









LOVE TO SPEND
SCORE : 21%



Rank #10 of 13 sectors

Highly aspirational but financially challenging as a sector, young people dream of travel but face budget constraints. Brands succeed through accessible pricing, creative work arounds and transparent value.

01		68%	Local experience platform
02		61%	Package deal accessibility
03	Booking.com	60%	Price comparison hub
04	Jet2.com	60%	
05	Emirates	53%	
06		55%	
07		51%	
08		50%	
09		49%	
10	Premier Inn	47%	

Brand spotlight: Jet2's viral charm

Jet2 shouldn't work as a beloved brand yet they achieved something remarkable by becoming an online meme. Viral TikToks of cabin crew dancing, unexpected in-flight entertainment, and the iconic "Jet2 holidays" jingle turned a no-frills carrier into a cultural phenomenon. What resonates with 16-24 year olds is their authentic personality, where staff seem genuinely happy to engage, and young people notice.

Aside from the memes, Jet2 also delivers transparent value. All-inclusive pricing means young consumers know exactly what they're paying for upfront – no nasty surprise fees destroying their carefully planned budgets. For 16-24 year olds managing limited holiday funds, they embrace rather than fight budget positioning by being proudly affordable.

The strategy takeaways

- 01 Personality overcomes sector positioning – Authentic brand personality builds emotional connections in budget sectors.
- 02 Embrace viral moments – Organic social virality builds brand love advertising struggles to achieve.
- 03 Transparency builds trust – Young consumers prioritise knowing total costs upfront over aspirational positioning.



Jet2's ability to turn a viral trend into a cultural moment shows how brands can capture attention by embedding themselves in youth culture. Travel has become an essential spend category, with Gen Z often prioritising experiences over possessions, and Jet2 have made themselves relevant in this space.

Molly Elrington, Retail & Travel Client Partner, Awin



Automotive

LOVE TO SPEND
SCORE : 14%

Rank #11 of 13 sectors

Getting from A to B is the priority for 16-24 year olds. The automotive sector is more about convenience than owning a car.

01	halfords	46%	Cycling and car accessories
02	Uber	45%	Mobility-as-a-service leader
03	AA	40%	Learner driver essential
04	RED <small>DRIVERS EDUCATION</small>	37%	
05	zipcar	33%	
06	KwikFit	32%	
07	Hertz	31%	
08	OUTO <small>CAR PARTS</small>	28%	
09	BSM	28%	
10	Europcar	24%	

Brand spotlight: Uber's ownership alternative

Uber fundamentally changed young people's relationship with automotive brands. Previous generations equated car ownership with adulthood and independence. For urban young people, Uber makes economic sense.

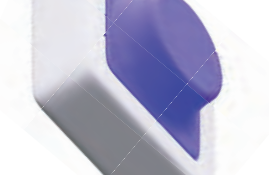
The app interface perfected convenience. Cashless payment, upfront pricing, tracked journeys, accountability through ratings created trust traditional taxis never achieved. Uber also enables lifestyle flexibility. Young consumers living fluidly, moving between cities, changing jobs frequently, Uber supports what car ownership complicates.

The strategy takeaways

- 01 Staff support transcends transport issues – Consumers find reassurance in speaking to a person when buying tools (vs online purchasing).
- 02 Driving schools are trusted to deliver – Although learning to drive is a rite of passage, 16-24 year olds trust the processes big brands use to get them there.
- 03 City life challenges car ownership – It's expensive to learn to drive and buy a car so Gen Zalpha are opting out, and relying on public transport, taxis and car sharing.

Department stores & marketplaces

LOVE TO SPEND SCORE: 13%



Rank #12 of 13 sectors

The functional sector where efficiency is king and the brands winning solve problems through convenience and value.

01		86%	The 'everything store' dominance
02		82%	Same-day collection convenience
03		81%	Resale marketplace leader
04		76%	
05		74%	
06		70%	
07		66%	
08		63%	
09		61%	
10		59%	

Brand spotlight: Amazon's utility dominance

Amazon.co.uk ranks #13 overall despite this sector ranking second-to-last for 'love to spend' score (13%). Proving that being necessary, rather than desirable can win loyalty. Young consumers don't love shopping on Amazon – they depend on it. Prime Student transforms Amazon from retailer into infrastructure.

Amazon has also perfected friction-free utility. One-click purchasing, saved payment methods, and delivery to campus lockers which eliminates every obstacle between need and fulfilment. Gen Zalpha don't browse Amazon for fun, they use it to solve immediate problems efficiently.

The strategy takeaways

- 01 Utility beats style – Brands that solve problems rather than being 'cool' wins in this sector.
- 02 Loyalty built into membership – Prime Student membership builds long-term loyalty beyond student years.
- 03 Convenience delivers market share – Speed, simplicity, and reliability win over discovery or brand connection.



Finance & utilities

LOVE TO SPEND
SCORE: 13%



Rank #13 of 13 sectors

Spending on utility feels like an obligation not a choice. Yet brands solving genuine problems earn loyalty through elegance.

01	PayPal	87%	Digital payment trust leader
02	EVRI delivery made for you	61%	Delivery service necessity
03	sky	57%	Connectivity provider
04	Virgin media	55%	
05	O₂	52%	
06	BT	51%	
07	V O X I mobile	50%	
08	TalkTalk	49%	
09	E E	48%	
10	vodafone	46%	

Brand spotlight: PayPal's boring brilliance

PayPal ranks #1 overall despite Finance & Utilities being ranked last for "love to spend". When brands solve real problems beautifully, emotional connection follows regardless of category excitement. You can always trust PayPal to make online payments when brand trust is hard to come by. When buying from unfamiliar websites or sending money to friends, PayPal's buyer protection removes risk from digital transactions.

The platform also perfected simplicity. One login accesses stored payment methods across countless websites, eliminating repetitive form-filling young people find insufferable. PayPal becomes invisible infrastructure – present everywhere, noticed nowhere. Peer-to-peer functionality created social utility beyond commerce. Splitting bills, reimbursing tickets, collecting group gifts happens through PayPal because everyone already has accounts.

The strategy takeaways

- 01 Utility is everything – Boring sectors can build emotional connections through elegant problem-solving.
- 02 Trusted infrastructure wins long-term – Reliability and security matter more than innovation or excitement.
- 03 Solve real problems elegantly – Young consumers avoid unnecessary spending here; identify genuine pain points and demonstrate how you solve them.

CHAPTER 6:

Strategic commentary & summary

The grey space generation: How UK brands win by defying categories

UK 16-24 year olds have mastered portfolio thinking: shop premium when it matters, shop practical when it doesn't. But here's what makes the UK market distinct – the brands winning aren't just budget or premium. They've created something new in the grey space between categories.

Greggs doesn't compete with restaurants, cafes, fast food, or meal deals – they've created something entirely their own. Sports Direct isn't just fashion, or sport, or 'cheap' – it's all of them. Providing the accessibility layer that makes premium brands achievable. PayPal isn't a bank or a brand – it's access to careful and protected spending. These brands succeed because they don't fit into existing boxes, they have created their own.

Own your role unapologetically

If you're the accessibility layer:

You're not just a discount brand, you're the bridge making desired brands achievable. Stop apologizing, and instead make young people feel smart for choosing you.

If you're the quality foundation:

You're not boring essentials, you're reliable infrastructure winning by solving problems so consistently you become invisible.

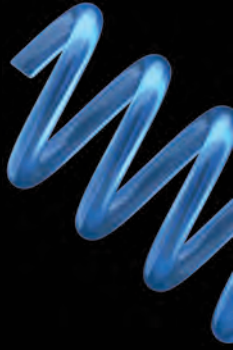
If you're the affordable premium:

You're not cheap luxury, you're achievable quality proving exceptional products at accessible prices build fiercer loyalty than aspirational positioning.

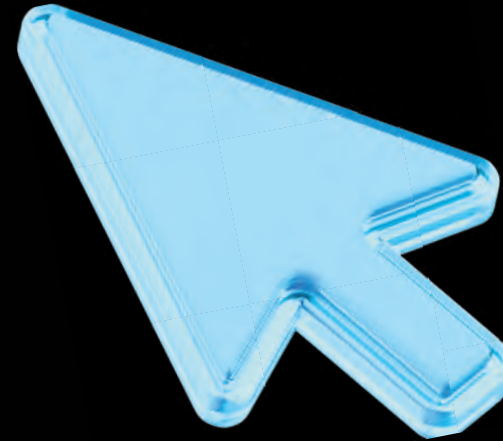
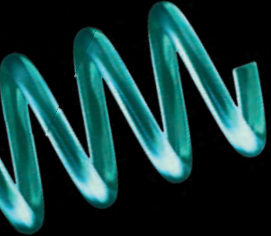
Close the affordability gap

From cautious budgeters to optimizing earners, all four personas share one need: strategic discount programmes that close the gap between desire and affordability.

Given the popularity of loyalty programmes and student discounts, they're not just used for occasional bargain-hunting – they're how 16-24 year olds shop. Student discounts aren't margin erosion, they're relationship investments, providing affordability for young people ready to buy, but held back by rent consuming 75% of their budget.



Final thoughts



The gap between what 16-24 year olds want and what they can afford is measurable, fixable, and filled with opportunity. This year's Pion100 Report reveals where brand love and loyalty sits in the UK – with brands that have found and celebrated their grey space.

Pion gives you the tools to find your space through strategic student discount and loyalty programmes that turn budget-conscious young people into lifelong advocates.

Want to climb the Pion100 list next year? Let's talk.



PION.100 the long list

Greggs	Amazon Prime	Emirates Airline Ltd	Lacoste	Go Ape	Boux Avenue Ltd	Flip Out	Gifts	OddBalls	Byron Burgers
Netflix	B&Q	Papa John's Pizza	YO! Sushi	ASICS	Beefeater	Oh Polly	Huawei Enterprise	Stena Line	Thomas Sabo
YouTube	Calvin Klein UK	AliExpress Ltd	Shozone	The Gym Group	Office Shoes	Itsu	Hush	Casetify	Firebox
H&M	Deliveroo	Vans	Revolution	LG Electronics UK	Mango	Represent Clothing	Coast UK	Harvey Nichols	Jo Malone London
Spotify	Taco Bell	TGI Friday's	Groupon	H.Samuel	BoohooMAN	Start Fitness	Fossil	In The Style	Food Hub Ltd
Nike	Steam	Xbox Game Pass	Footasylum	Travelodge	Harvester	Endsleigh	Intimissimi	Goose and Gander	Cernucci
McDonald's	Superdrug	Shein Global	Tortilla	Plusnet	Claire's Stores, Inc	Youth Hostels Assoc	Lola's Cupcakes	Boho Moon	LNER
Sainsbury's	The Perfume Shop	Ted Baker	Hotel Chocolat	Calm	Wix	London Dungeon	Wayfair	Snap Fitness	& Other Stories EU
Subway	Thorpe Park	Fitbit UK	Acer	National Express	Fitness First	Toolstation	BrewDog	Ableton	Wizz Air
Sports Direct	Disneyland	Tommy Hilfiger	Under Armour EU	Caffè Nero	Size?	Hobbs	Wowcher	Ernest Jones	iD Mobile
PayPal	Hugo Boss	LEGOLAND Windsor	Converse EU	Prezzo	Crunchyroll Inc	Beauty Bay	Sonos UK	ProCook Ltd	Montirex LTD
KFC	PizzaExpress	GAP	Waterstones	Funky Pigeon	Singapore Airlines	Greene King	Madame Tussauds	Factory Media	Lufthansa UK
Amazon.co.uk	Zara	Sky Sports	Headspace	Group SpA	Debenhams	Rituals	Cathay Pacific	Redbubble UK	Bo&Tee
Tesco	Gymshark	O2 (Telefonica)	Hobbycraft	Grammarly	Accessorize Ltd	Anytime Fitness	Airways	Philips Appliances	Hawes & Curtis Ltd
Disney+	John Lewis	Trainline UK	e.l.f. Beauty	ASDA mobile	Michael Kors	Regatta	Columbia Sportswear	Swarovski Crystal	Greater Anglia
Nando's	The Fragrance Shop	The Ordinary	Chessington World of Adventures	Stagecoach	Slim Chickens	TONI&GUY	White Stuff	Online AG	Ede & Ravenscroft
eBay	Dior	NYX	Ninja Warrior UK	AA Driving school	TrainPal	Ocado	The Consortium	Meshki	Richer Sounds
Argos	Sky	Depop	London Eye	Myprotein	Ray Ban t/a Luxottica	Monsoon Brands Ltd	Merlin Entertainments Ltd	Paperchase	Pink Boutique
Lidl	Waitrose	BT Broadband	Matalan	Adidas Headphones	Group SpA	Viator (Trip Advisor)	Warren James	Octopus Energy	iD
Prime Video	EasyJet Holidays	Urban Outfitters UK	Shake Shack	Boohoo Group PLC	The Protein Works	Runners Need	Jewellers	Cult Beauty	Stussy
adidas EU	Dyson	Superdry	Chester Zoo	Qatar Airways (Worldwide)	Laptops Direct	NARS Cosmetics	HP EU	We Love Holidays Ltd	Joma Jewellery
Burger King UK	Etsy	Smyths Toys	Vue	Pro:Direct Sport	Warehouse	rhode	Levi Strauss & Co EU	Carhartt WIP	Jigsaw
Aldi	Sky	Puma UK	PrettyLittleThing	Ethad Airways	Showcase Cinemas	Yes Style	Quiz Clothing	American Golf	Sezane UK
TK Maxx	Build-A-Bear	Evri	Selfridges Ltd	Homebase	Morphe	Uber Eats Germany	Sephora (FeelUnique)	Lenstore	Vax Ltd
Apple TV	Duolingo	Reebok	Uber London Ltd	Headspace	Flying Tiger	Pleasure Beach	Lebara Mobile	Groupon Intl Ltd	Astrid & Miyu
Asda	ASOS UK	Specsavers	NowTV	Virgin Atlantic	Copenhagen	Resort	Virgin Active	Lane7	Nasty Gal
Iceland	ASOS UK	Specsavers	NowTV	Virgin Atlantic	Jack Wills	Xiaomi UK	Everyman Cinemas	Canva US	Glasses Direct UK
Samsung Electronics (UK) Ltd	Booking.com	Popeyes	Ticketmaster UK	National Trust	Vivienne Westwood	Hertz UK	Pizza Pilgrims	ASICS Onitsuka Tiger	Flamingo Land
LEGO	Currys PC World	National Rail	JBL UK	JBL UK	Mitchells & Butlers	Very.co.uk	TeamSport	Secret Sales	Babyboo
Costco	Pandora Jewellery	Bershka UK	Clarks UK	Sports Shoes	Dreams	Dune London	Butlin's	Gousto	Alpine Trek
Boots	UK Ltd	Holland & Barrett	Fashion Nova	Apple Retail EMEA	SharkNinja EU Ltd	French Connection	Euro Car Parts Ltd	Net A Porter	Apricot Clothing
Domino's Pizza	My Nintendo Store	Vodafone UK Ltd	Crocs	Adobe	Ryman	Club L London	Rains UK	ALDO Shoes	Lounge Underwear
IKEA UK	Dunelm	Frankie & Benny's	British Airways	Holidays	GHD Hair	Space NK	Laura James	Sevenstore	Liberty Ltd
Nintendo	Temu UK	J D Wetherspoons	Holidays	Dixons - Currys	Pull & Bear	Space NK	AO	KOKORO	Eurotunnel Le Shuttle
JD Sports	J D Wetherspoons	Maybelline	British Airways	Sky Broadband	Sephora	Megabus	House of CB UK	Cath Kidston	Temptation Gifts Ltd
Morrisons	Maybelline	Sky Broadband	Holidays	Lush	Wagamama UK & IE	Bill's Restaurant Bar	David Lloyd Leisure	Honor UK	StockX
B&M	Sky Broadband	Lush	Dixons - Currys	Crocs	ASUS	Jaded LDN	allbeauty	Student Roost	Oliver Bonas
Just Eat	Cineworld	The Body Shop	TalkTalk	Adobe	White Fox Boutique	Joules	Papier	The Hut	Skinnydip london
Pizza Hut UK & EU	The Body Shop	Alton Towers	German Doner	Frankie & Benny's	Giffgaff	Squarespace	Longchamp	Mamas & Papas	Cotswold Outdoor
Primark	Alton Towers	Oasis	Kebab	British Airways	Glossier	KLM	ON Running	BarBurrito	Three Mobile
Costa Coffee	Oasis	GoPro	Philips UK	Holidays	Jellycat Inc	Menkind	Typo	Cosmo Restaurants	(Hutchinson 3G UK Ltd)
Starbucks	GoPro	Audible	Ninja Kitchen	Dixons - Currys	Wickes	Brooks	Represent	Subdued	Offspring
Pets At Home	Audible	CeX	Dell	EE Ltd	Go Outdoors	Kitchen	Malaysia Airlines	Watch Shop	DJI
Krispy Kreme UK	CeX	Fenty Beauty	EE Ltd	Quizlet	Ann Summers Ltd	BetterHelp	CityLink	Boom Battle Bar	Mint Velvet
Microsoft UK	Fenty Beauty	GAME.co.uk	Quizlet	Savers	Simply Be	Mountain Warehouse	Discovery Inc	Fred Perry	Missoma
The North Face	GAME.co.uk	Amazon Kindle	Savers	Yankee Candle UK	The Entertainer	Carphone Warehouse	BSM Driving School	Honest Burgers	ZSL London Zoo
Next	Amazon Kindle	Victoria's Secret	Yankee Candle UK	Tenpin	Hulu	Air Up	Razer	Banana Tree	ATG Entertainment
The Range	Victoria's Secret	Google Store	Tenpin	FreePrints	House of Fraser	Goldsmiths	Omniplex Cinemas	L'Occitane UK	Tidal
Vinted	Google Store	George At Asda	FreePrints	Premier Inn at Home	Heavenly Desserts	Smiggle	DFS	Cotton On	Dorothy Perkins/Burton
Ralph Lauren	George At Asda	Virgin Media	Premier Inn at Home	Disney Store	Logitech	Enterprise Rent-A-Car	REFY	Nuffield Health	Kate Spade
Five Guys	Virgin Media	PureGym	Disney Store	Charlotte Tilbury	Foot Locker EU	Clinique	Fenwick	Jacamo	EuropCar
Sony	PureGym	New Look	Charlotte Tilbury	Skechers	Slug and Lettuce	Coach	GetYourGuide	Route One	The Wild
New Balance	New Look	ODEON UK	Skechers	Bella Italia	Uniqlo	Blakely Clothing	Brandy Melville	Not On The High Street	The Clothing Club
Airbnb	ODEON UK	Ryanair	Bella Italia	Chipotle	Moonpig	Flat Iron	Giggling Squid	AX Paris	NCP
Xbox	Ryanair	Wingstop	Chipotle		NOW TV	Zipcar	Lulla Bellz	Bravissimo	Huel Ltd
Marks & Spencer	Wingstop				Bose	Black Sheep Coffee	C D Keys	Stansted Express	Stradivarius
PlayStation					Hollywood Bowl	Eurostar	Yours Clothing	Edikted	Vistaprint
					Harrods	Flixbus	Avanti West Coast	Wild Cosmetics Ltd	YourParkingSpace
					River Island	Free People	Wilko (CDS)	Gant AB	Blank Street
					Hotels.com UK	Kwik-Fit	Superstores Intl)	Cosy Club	Zee and Co
					Hungry Horse	Barbour	Wasabi	TOWER London	Motel Rocks
					Decathlon UK	Beauty Works Online	Kiehls	Grenade	Garmin
					Screwfix	Team SportVI	Drayton Manor Park	Udemy	MarsTheLabel
					TUI	Missguided UK	Virgin Experience	Quillbot (Learneo Inc)	Sole Trader

TG Jones High St Ltd
 ClassPass
 Medisave
 Frasers Group
 Snow+Rock
 COS
 Bulk Powders
 Hyperoptic
 Franco Manca
 Veygo
 Blackwell's Bookshops
 Thortful
 Puttshack
 Wob UK
 Habitat UK
 TodayTix
 Ace & Tate
 Dickies
 gear4music
 My OddBalls
 Reiss
 Wahaca
 Gift Unv. Group Ltd
 Steve Madden EU
 Udemmy UK
 Sixt
 Busaba
 First Choice
 MandM Direct
 Consortium
 WHOOP Inc.
 Feel Good
 Contacts Ltd
 Justmylook
 Las Iguanas
 Robert Dyas
 Farfetch UK Ltd
 Monki
 Arc'teryx UK
 Charles & Keith UK Ltd
 Kurt Geiger
 Pour Moi
 Phase Eight
 Stubble & Co
 Liberty
 Hoseasons
 Knoops
 Axel Arigato
 i-D
 EMP
 Anthropologie
 Expedia Group
 Peacocks (Anglo Global
 Property LTD)
 Omio
 Loop Earplugs
 Whittard of Chelsea
 Fjallraven
 Shade Station
 FitFlop
 Redbubble
 Nobody's Child
 Chilly's Bottles
 Curzon Cinemas

Yeti
 Peppermayo
 Pavers Shoes
 Facetheory
 WEEKDAY
 ISAWITFIRST
 MPB
 Misspap
 The Bannatyne Group
 Flatspot LTD
 Purple Parking
 DFYNE
 Rosa's Thai Cafe
 Zip World
 Hostelworld
 ASK Italian
 Patagonia
 Karen Millen
 Mainline Menswear
 SSENSE UK
 Overclockers
 Black Circles
 ARKET
 OnePlus (Guangdong OPPO
 Mobile Telecomms Ltd)
 Sisters and Seekers
 TALA
 Sweaty Betty
 Monica Vinader
 Treatwell Ltd
 Oner Active
 Verizon Media
 Cass Art
 DUSK.com
 MUJI EU
 Scotrail Railways Ltd
 Beaverbrooks
 Boston Tea Party
 Clubhouse Golf Ltd
 Bloom & Wild Ltd
 Flatspot Skate Shop
 Reformation
 The White Company
 Wiggle
 Princess Polly
 Moss Bros Group Ltd
 ebuyer
 Ellis Brigham
 Oakley t/a Luxottica Group
 SpA
 Public Desire
 Frank Green
 Adanola
 Vapiano
 Reserved
 Disturbia
 Steve Madden EU
 Mytheresa
 Brand Alley UK
 Jacobs & Turner Ltd t/a
 Trespass
 Vivobarefoot
 Jessops
 Calzedonia

Owalalife
 Finisterre
 runnersneed
 Air France UK
 Shokz
 Katie Loxton
 Stylevana
 Zalando
 it Luggage
 AYBL (RK Brands Ltd)
 Vision Direct EU Ltd
 NA-KD UK
 Runna
 Wildwood
 Oysho
 Cettire
 Escentual
 Longlead Enterprises
 USC UK
 Boden
 Working Class Heroes
 Antler
 Musclefood
 Veja
 Ego Shoes
 Mainline
 HSNF (MyLee)
 Tredz
 Antler US
 PMT
 Trip.com China
 Lakeland
 Blacks
 Daals
 Bolt Operations OÜ
 The Hip Store
 The Real Greek
 Lucy & Yak
 Osprey EU
 Coast Stores
 Hoka One One
 Notino
 Whistles Ltd
 Foyles
 Snapfish
 ManoMano
 Zavvi
 Mowgli
 END.
 Charles Tyrwhitt
 Damson Madder
 Samsonite UK Ltd
 Laced (The Very Group)
 Antler AU
 Agoda Company
 MR PORTER

Appendix

The Pion100 UK report methodology

Research Design

- Sample: 2,131 UK consumers aged 16-24
- Fieldwork period: September 2025
- Method: Online quantitative survey
- Survey design: Josephine Hansom

Brand Selection & Testing

We analyzed over 700 brands across 13 retail sectors. Brands were selected based on search behaviour and discount demand on Pion's platform. These are brands young people actively seek out and hunt deals for. Each respondent rated 38-40 brands, and each brand received 100 responses. This methodology ensured broad coverage while maintaining survey engagement.

The Love Scale Metric

Our core metric measures positive brand sentiment by asking respondents: "How do you feel about [brand]?"

Response options:

LOVE IT

LIKE IT

INDIFFERENT

DISLIKE IT

HATE IT

DON'T KNOW IT

Love + Like It = (% who selected "Love it" + % who selected "Like it") among those aware of the brand.

By combining Love and Like metrics we identified brands earning genuine affection, not just awareness or tolerance. When we report "Greggs scored 92% brand love", this means 92% of young people who know Greggs have positive feelings toward it (either Love or Like).

Brand love percentages represent positive sentiment among respondents who know that brand. Respondents who selected "Don't know it" are excluded from calculations, focusing analysis on actual brand relationships rather than brand awareness gaps.

Spending Personas

The four spending personas were identified based on patterns observed in Pion's Student Spending Report, and validated in this study through questions on:

- Funding sources (family support vs. self-funded through work/loans/savings)
- Social habits and lifestyle patterns
- Deal-hunting behaviour across categories

These personas were then compared for differences in spending patterns, brand preferences, and discount usage.

Deal-Seeking Behaviour

We measured discount engagement through three questions: usage, regular usage, sector usage. This multi-angle approach captured both anecdotal 'regular' usage and actual usage through recent behavioural data.

Sector Analysis

Brands were categorized into 13 sectors: Fashion, Food & Drink, Beauty & Grooming, Consumer Electronics & Tech, Entertainment & Leisure, Everyday Essentials, Health/Fitness/Wellbeing, Home & Living, Books/Gifts/Hobbies, Travel & Holidays, Automotive, Department Stores & Marketplaces, and Finance & Utilities.

"Love to spend" percentages represent respondents who selected each sector when asked: "Which of these sectors do you love to buy things from?"



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a growth expert.